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BSB Business Services Training Package

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Links

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

BSB10115 Certificate I in Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This entry-level qualification allows individuals across a variety of industry sectors to develop basic skills and knowledge to prepare for work. They may undertake a range of simple tasks under close supervision. The range of technical skills and knowledge is limited.

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

1 core unit plus

5 elective units, of which:

- 4 elective units must be selected from the elective units listed below
- 1 elective unit may be selected from the remaining elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level.

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.

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Core Units

BSBWHS201 Contribute to health and safety of self and others

Elective Units

BSBADM101 Use business equipment and resources
BSBIND201 Work effectively in a business environment
BSBCMM101 Apply basic communication skills
BSBITU101 Operate a personal computer
BSBITU102 Develop keyboard skills
BSBITU201 Produce simple word processed document
BSBITU202 Create and use spreadsheets
BSBLED101 Plan skills development
BSBSUS201 Participate in environmentally sustainable work practices
BSBWOR202 Organise and complete daily work activities

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB10115 Certificate I in Business	BSB10112 Certificate I in Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB20115 Certificate II in Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals in a variety of junior administrative positions who 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 = 12

1 core units plus

11 elective units of which:

- 7 elective units must be selected from the elective units listed below
- 4 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 2 of the 4 elective units may be selected from either a Certificate I or a Certificate III qualification.

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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

BSBWHS201 Contribute to health and safety of self and others

Elective Units

BSBCUS201 Deliver a service to customers

BSBIND201 Work effectively in a business environment

BSBINM201 Process and maintain workplace information

BSBINM202 Handle mail

BSBINN201 Contribute to workplace innovation

BSBCMM201 Communicate in the workplace

BSBITU201 Produce simple word processed documents

BSBITU202 Create and use spreadsheets

BSBITU203 Communicate electronically

BSBSMB201 Identify suitability for micro business

BSBSUS201 Participate in environmentally sustainable work practices

BSBWOR202 Organise and complete daily work activities

BSBWOR203 Work effectively with others

BSBWOR204 Use business technology

FNSACC301 Process financial transactions and extract interim reports

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB20115 Certificate II in Business	BSB20112 Certificate II in Business	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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

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BSB20215 Certificate II in Customer Engagement

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who typically work with multiple communication channels, capture data and provide customer service. Typically, individuals in this role work under direct supervision, with limited authority to delegate.

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 units must be from the elective units below
- the remaining 3 units may be from the elective units below, or from qualifications at the same level or one higher in any endorsed Training Package 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.

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Core Units

BSBCUE203 Conduct customer engagement

BSBCUE205 Prepare for work in a customer engagement environment

BSBCMM201 Communicate in the workplace

Elective Units

BSBCUE301 Use multiple information systems

BSBCUE305 Process credit applications

BSBCUE308 Conduct outbound customer engagement

BSBCUE309 Develop product and service knowledge for customer engagement operation

BSBCMM301 Process customer complaints

BSBCUS201 Deliver a service to customers

BSBITU101 Operate a personal computer

BSBITU203 Communicate electronically

BSBLED301 Undertake e-learning

BSBWHS201 Contribute to health and safety of self and others

BSBWOR201 Manage personal stress in the workplace

BSBWOR203 Work effectively with others

ICTICT103 Use, communicate and search securely on the internet

ICTICT203 Operate application software packages

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB20215 Certificate II in Customer Engagement	BSB20211 Certificate II in Customer Contact	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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

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BSB30115 Certificate III in Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the varied roles of individuals across different industry sectors who 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 = 12

1 core unit plus

11 elective units, of which:

- 7 of the elective units must be selected from the elective units listed below
- 4 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at the same qualification level
- if not listed below, 1 elective unit may be selected from a Certificate II qualification and 2 elective units may be taken from a Certificate IV qualification.

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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

BSBWHS302 Apply knowledge of WHS legislation in the workplace

Elective Units

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBFLM303 Contribute to effective workplace relationships

BSBFLM305 Support operational plan

BSBFLM306 Provide workplace information and resourcing plans

BSBFLM309 Support continuous improvement systems and processes

BSBFLM311 Support a workplace learning environment

BSBFLM312 Contribute to team effectiveness

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBINN301 Promote innovation in a team environment

BSBIPR301 Comply with organisational requirements for protection and use of intellectual property

BSBITU301 Create and use databases

BSBITU302 Create electronic presentations

BSBITU303 Design and produce text documents

BSBITU304 Produce spreadsheets

BSBITU305 Conduct online transactions

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBPRO301 Recommend products and services

BSBPUR301 Purchase goods and services

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BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWRT301 Write simple documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30115 Certificate III in Business	BSB30112 Certificate III in Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30215 Certificate III in Customer Engagement

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working in a range of complex customer service roles.

Duties at this level would include working with multiple communication channels, providing excellent customer service, adhering to key performance indicators, working in a team environment, providing support to a team, providing technical advice and capturing data.

Individuals would work under supervision, but may have some authority to delegate.

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 units must be from Group A elective units below

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- the remaining 6 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package 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

BSBCUE301 Use multiple information systems

BSBCUE307 Work effectively in customer engagement

BSBCUE309 Develop product and service knowledge for customer engagement operation

BSBCUS301 Deliver and monitor a service to customers

Elective Units

Group A

BSBCUE203 Conduct customer engagement

BSBCUE204 Collect data

BSBCUE302 Deploy customer service field staff

BSBCUE303 Conduct a telemarketing campaign

BSBCUE304 Provide sales solutions to customers

BSBCUE305 Process credit applications

BSBCUE306 Process complex accounts

BSBCUE308 Conduct outbound customer engagement

BSBCUE403 Schedule customer engagement activity

BSBCMM301 Process customer complaints

BSBITU203 Communicate electronically

BSBITU307 Develop keyboarding speed and accuracy

BSBLED301 Undertake e-learning

BSBWOR203 Work effectively with others

BSBWOR301 Organise personal work priorities and development

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Group B

BSBMGT401 Show leadership in the workplace

BSBMGT402 Implement operational plan

BSBMGT405 Provide personal leadership

BSBSLS407 Identify and plan sales prospects

BSBSLS408 Present, secure and support sales solutions

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS201 Contribute to health and safety of self and others

BSBWHS302 Apply knowledge of WHS legislation in the workplace

BSBWOR201 Manage personal stress in the workplace

FNSSAM301 Identify opportunities for cross-selling products and services

ICTICT209 Interact with ICT clients

ICTSAS204 Record client support requirements

ICTSAS305 Provide ICT advice to clients

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30215 Certificate III in Customer Engagement	BSB30211 Certificate III in Customer Contact	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30315 Certificate III in Micro Business Operations

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of skilled independent and micro-business contractors who 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

5 core units plus

5 elective units, of which:

- all 5 elective units may be selected from the elective units listed below and/or a Certificate III qualification from any currently endorsed Training Package or accredited course at the same qualification level
- 1 elective unit may be selected from a Certificate II or Certificate IV qualification if not listed below.

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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

BSBSMB301 Investigate micro business opportunities

BSBSMB302 Develop a micro business proposal

BSBSMB303 Organise finances for the micro business

BSBSMB304 Determine resource requirements for the micro business

BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business

Elective Units

BSBCRT301 Develop and extend critical and creative thinking skills

BSBCRT501 Originate and develop concepts

BSBCUS301 Deliver and monitor a service to customers

BSBEBU401 Review and maintain a website

BSBFIA301 Maintain financial records

BSBFIA303 Process accounts payable and receivable

BSBHRM405 Support the recruitment, selection and induction of staff

BSBINN301 Promote innovation in a team environment

BSBINT303 Organise the importing and exporting of goods

BSBIPR405 Protect and use intangible assets in small business

BSBITU305 Conduct online transactions

BSBREL401 Establish networks

BSBSMB306 Plan a home-based business

BSBSMB307 Set up information and communications technology for the micro business

BSBSMB308 Improve energy efficiency in micro or small business operations

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

FNSFLT201 Develop and use a personal budget

SIRXQUA001A Develop innovative ideas at work

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Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30315 Certificate III in Micro Business Operations	BSB30307 Certificate III in Micro Business Operations	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30415 Certificate III in Business Administration

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification applies to a range of administrative roles in varied contexts.

Individuals in these positions use some discretion and judgement and 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

2 core units plus

11 elective units, of which:

- 7 elective units must be selected from the Group A units listed below
- 4 elective units may be selected from the Group A or Group B elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 2 of the electives units may be selected from a Certificate II or Certificate IV qualification.

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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

BSBITU307 Develop keyboarding speed and accuracy

BSBWHS201 Contribute to health and safety of self and others

Elective Units

Group A

BSBADM307 Organise schedules

BSBFIA302 Process payroll

BSBFIA303 Process accounts payable and receivable

BSBFIA304 Maintain a general ledger

BSBITU302 Create electronic presentations

BSBITU303 Design and produce text documents

BSBITU304 Produce spreadsheets

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBWRT301 Write simple documents

Group B units

BSBADM302 Produce texts from notes

BSBADM303 Produce texts from audio transcription

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

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BSBINM302 Utilise a knowledge management system

BSBINM303 Handle receipt and despatch of information

BSBINN201 Contribute to workplace innovation

BSBIPR301 Comply with organisational requirements for protection and use of intellectual property

BSBITU301 Create and use databases

BSBITU305 Conduct online transactions

BSBPRO301 Recommend products and services

BSBSUS201 Participate in environmentally sustainable work practices

BSBWOR204 Use business technology

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30415 Certificate III in Business Administration	BSB30412 Certificate III in Business Administration	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30515 Certificate III in Business Administration (International Education)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals working in international education administration who apply a broad range of competencies using some discretion and judgement 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 = 12

5 core units plus

7 elective units, of which:

- 5 elective units must be selected from the elective units listed below
- 2 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from a Certificate II or Certificate IV qualification.

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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

BSBDIV301 Work effectively with diversity

BSBEDU301 Assist with monitoring compliance in international education services

BSBEDU302 Assist in resolution of issues and incidents in an international education environment

BSBIND302 Work effectively in the international education services industry

BSBITU306 Design and produce business documents

Elective Units

BSBADM307 Organise schedules

BSBADM311 Maintain business resources

BSBADM405 Organise meetings

BSBADM406 Organise business travel

BSBCUS301 Deliver and monitor a service to customers

BSBEDU303 Assist with the provision of international education information

BSBEDU304 Assist with the provision of pastoral care services to international students

BSBEDU305 Assist with international education events and programs

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBITU202 Create and use spreadsheets

BSBITU301 Create and use databases

BSBITU302 Create electronic presentations

BSBITU307 Develop keyboarding speed and accuracy

BSBITU309 Produce desktop published documents

BSBMKG401 Profile the market

BSBRKG402 Provide information from and about records

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWRT301 Write simple documents

BSBWHS301 Maintain workplace safety

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BSBWHS302 Apply knowledge of WHS legislation in the workplace

CHCAD402D Support the interests, rights and needs of clients within duty of care requirements

ICTICT103 Use, communicate and search securely on the internet

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30515 Certificate III in Administration (International Education)	BSB30507 Certificate III in Administration (International Education)	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30615 Certificate III in International Trade

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for skilled operators who use some discretion, judgement and relevant theoretical knowledge to a broad range of international trade competencies in varied work roles.

Individuals in these positions 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 = 12

1 core unit plus

11 elective units, of which:

- 5 elective units must be selected from the Group A units listed below
- 4 elective units must be selected from the Group A or Group B units listed below
- 2 elective units may be selected from the Group A or Group B elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level

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- if not listed below, 1 of the elective units may be selected from either a Certificate II or Certificate IV qualification.

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

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Elective Units

Group A

BSBINT301 Apply knowledge of the international trade environment to complete work

BSBINT302 Apply knowledge of legislation relevant to international trade to complete work

BSBINT303 Organise the importing and exporting of goods

BSBINT304 Assist in the international transfer of services

BSBINT305 Prepare business documents for the international trade of goods

BSBINT306 Apply knowledge of international finance and insurance to complete work requirements

Group B units

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBITU303 Design and produce text documents

BSBITU305 Conduct online transactions

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BSBITU306 Design and produce business documents

BSBPRO301 Recommend products and services

BSBPUR301 Purchase goods and services

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWRT301 Write simple documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30615 Certificate III in International Trade	BSB30612 Certificate III in International Trade	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30715 Certificate III in Work Health and Safety

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for skilled operators who take on Work Health and Safety (WHS) responsibilities 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.

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:

- at least 3 units must be from the elective units below
- the remaining units may be from any currently endorsed Training Package or accredited course at the same qualification level
- 1 elective unit may be selected from a Certificate II or Certificate IV from any currently endorsed Training Package or accredited course.

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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

BSBWHS302 Apply knowledge of WHS legislation in the workplace

BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control

BSBWHS304 Participate effectively in WHS communication and consultation processes

BSBWHS305 Contribute to WHS issue resolution

PUAWER001B Identify, prevent and report potential workplace emergency situations

Elective Units

BSBCMM201 Communicate in the workplace

BSBDIV301 Work effectively with diversity

BSBFLM303 Contribute to effective workplace relationships

BSBINM301 Organise workplace information

BSBINN201 Contribute to workplace innovation

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS406 Assist with responding to incidents

BSBWRT301 Write simple documents

CPPWMT3044A Identify wastes and hazards

HLTAID003 Provide first aid

HLTAID005 Provide first aid in remote situation

PUAWER004B Respond to workplace emergencies

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30715 Certificate III in Work Health and	BSB30712 Certificate III in Work Health and	Updated to meet Standards for Training	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
Safety	Safety	Packages	

Links

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

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BSB30815 Certificate III in Recordkeeping

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who apply some understanding of relevant theoretical knowledge relating to recordkeeping functions in the workplace. While it may apply to individuals whose sole workplace function is recordkeeping, it will also apply to people working in administration and human resources management.

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:

- 7 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate II or Certificate IV qualification.

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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

BSBRKG301 Control records

BSBRKG302 Undertake disposal

BSBRKG303 Retrieve information from records

BSBRKG304 Maintain business records

BSBRKG305 Review recordkeeping functions

Elective Units

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBINN201 Contribute to workplace innovation

BSBITU301 Create and use databases

BSBITU302 Create electronic presentations

BSBITU303 Design and produce text documents

BSBITU304 Produce spreadsheets

BSBITU305 Conduct online transactions

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBPRO301 Recommend products and services

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWRT301 Write simple documents

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB30815 Certificate III in Recordkeeping	BSB30807 Certificate III in Recordkeeping	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB30915 Certificate III in Business Administration (Education)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals who may provide technical advice and support to a team using some discretion and judgement across broad range of administrative competencies in an educational or school support context.

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

3 core units plus

10 elective units, of which:

- 4 elective units must be selected from the Group A units listed below
- 4 elective units must be selected from the Group B units listed below
- 2 elective units may be selected from the Group A, Group B or Group C units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level lower or higher.

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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

BSBITU307 Develop keyboarding speed and accuracy

BSBWHS201 Contribute to health and safety of self and others

BSBIND301 Work effectively in an educational environment

Elective Units

Group A units

BSBADM405 Organise meetings

BSBADM406 Organise business travel

BSBCUS301 Deliver and monitor a service to customers

BSBEBU401 Review and maintain a website

BSBMKG408 Conduct market research

CHCCS412E Deliver and develop client services

CHCCS407C Operate referral procedures

ICTICT103 Use, communicate and search securely on the internet

PSPETHC301B Uphold the values and principles of public service

PSPGOV314A Contribute to conflict management

PSPLEGN301B Comply with legislation in the public sector

Group B units

BSBADM307 Organise schedules

BSBFIA302 Process payroll

BSBFIA303 Process accounts payable and receivable

BSBFIA304 Maintain a general ledger

BSBITU302 Create electronic presentations

BSBITU303 Design and produce text documents

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BSBITU304 Produce spreadsheets

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBWRT301 Write simple documents

Group C units

BSBADM302 Produce texts from notes

BSBADM303 Produce texts from audio transcription

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBINM303 Handle receipt and despatch of information

BSBINN201 Contribute to workplace innovation

BSBITU301 Create and use databases

BSBITU305 Conduct online transactions

BSBPRO301 Recommend products and services

BSBSUS201 Participate in environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWOR204 Use business technology

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB30915 Certificate III in Business Administration (Education)	BSB30912 Certificate III in Business Administration (Education)	Updated to meet Standards for Training Packages	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
		Packaging rules changed to clarify intent	

Links

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

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BSB31015 Certificate III in Business Administration (Legal)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for legal receptionists who apply a broad range of administrative competencies in a legal environment. They would use some discretion and judgement and 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

2 core units plus

11 elective units, of which:

- 5 elective units must be selected from the Group A units listed below
- 4 elective units must be selected from the Group B units listed below
- 2 elective units may be selected from the Group A, Group B or Group C units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level higher or lower.

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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

BSBITU307 Develop keyboarding speed and accuracy

BSBWHS201 Contribute to health and safety of self and others

Elective Units

Group A units

BSBINM303 Handle receipt and despatch of information

BSBLEG301 Apply knowledge of the legal system to complete tasks

BSBLEG302 Carry out search of the public record

BSBLEG303 Deliver court documentation

BSBLEG304 Apply the principles of confidentiality and security within the legal environment

BSBLEG305 Use legal terminology in order to carry out tasks

BSBLEG306 Maintain records for time and disbursements in a legal practice

BSBLEG308 Assist in prioritising and planning activities in a legal practice

Group B units

BSBADM307 Organise schedules

BSBFIA302 Process payroll

BSBFIA303 Process accounts payable and receivable

BSBFIA304 Maintain a general ledger

BSBITU302 Create electronic presentations

BSBITU304 Produce spreadsheets

BSBITU303 Design and produce text documents

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBWRT301 Write simple documents

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Group C units

BSBADM302 Produce texts from notes

BSBADM303 Produce texts from audio transcription

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBINN201 Contribute to workplace innovation

BSBITU301 Create and use databases

BSBITU305 Conduct online transactions

BSBPRO301 Recommend products and services

BSBSUS201 Participate in environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWOR204 Use business technology

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB31015 Certificate III in Business Administration (Legal)	BSB31012 Certificate III in Business Administration (Legal)	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB31115 Certificate III in Business Administration (Medical)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for those working in various medical administration contexts. Individuals may exercise discretion and judgement using appropriate knowledge to 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

2 core units plus

11 elective units, of which:

- 5 elective units must be selected from the Group A units listed below
- 4 elective units must be selected from the Group B units listed below
- 2 elective units may be selected from Group A, Group B or Group C units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level higher or lower.

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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

BSBITU307 Develop keyboarding speed and accuracy

BSBWHS201 Contribute to health and safety of self and others

Elective Units

Group A units

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 B units

BSBADM307 Organise schedules

BSBFIA302 Process payroll

BSBFIA303 Process accounts payable and receivable

BSBFIA304 Maintain a general ledger

BSBITU302 Create electronic presentations

BSBITU303 Design and produce text documents

BSBITU304 Produce spreadsheets

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBWRT301 Write simple documents

Group C units

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BSBADM302 Produce texts from notes

BSBADM303 Produce texts from audio transcription

BSBADM311 Maintain business resources

BSBCMM301 Process customer complaints

BSBCUS301 Deliver and monitor a service to customers

BSBDIV301 Work effectively with diversity

BSBFIA301 Maintain financial records

BSBINM301 Organise workplace information

BSBINM302 Utilise a knowledge management system

BSBINM303 Handle receipt and despatch of information

BSBINN201 Contribute to workplace innovation

BSBITU301 Create and use databases

BSBITU305 Conduct online transactions

BSBPRO301 Recommend products and services

BSBSUS201 Participate in environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWOR204 Use business technology

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB31115 Certificate III in Business Administration (Medical)	BSB31112 Certificate III in Business Administration (Medical)	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40115 Certificate IV in Advertising

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for those who use well-developed advertising skills and a broad knowledge base in a wide variety of advertising contexts.

Individuals in these roles apply solutions to a defined range of unpredictable problems and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others, however they typically report to more senior advertising practitioners.

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 of the elective units must be selected from the elective units listed below
- 2 elective units may be selected from elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package
- if not listed below, one unit may be selected from either a Certificate III or Diploma level.

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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

BSBADV402 Conduct pre-campaign testing

BSBADV403 Monitor advertising production

BSBADV404 Schedule advertisements

BSBMKG401 Profile the market

BSBMKG402 Analyse consumer behaviour for specific markets

Elective Units

BSBADM409 Coordinate business resources

BSBADV405 Perform media calculations

BSBADV406 Buy and monitor media

BSBADV407 Apply media analysis and processing tools

BSBADV408 Review advertising media options

BSBADV503 Coordinate advertising research

BSBADV507 Develop a media plan

BSBADV509 Create mass print media advertisements

BSBADV510 Create mass electronic media advertisements

BSBCMM401 Make a presentation

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBCRT501 Originate and develop concepts

BSBFIA402 Report on financial activity

BSBITS401 Maintain business technology

BSBMKG408 Conduct market research

BSBMKG409 Design direct response offers

BSBMKG412 Conduct e-marketing communications

BSBMKG413 Promote products and services

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BSBMKG414 Undertake marketing activities

BSBMKG523 Design and develop an integrated marketing communication plan

BSBPUB401 Develop and apply knowledge of public relations industry

BSBPUB402 Develop public relations campaigns

BSBPUB403 Develop public relations documents

BSBPRO401 Develop product knowledge

BSBREL401 Establish networks

BSBREL402 Build client relationships and business networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

BSBWRT501 Write persuasive copy

CUFWRT401A Edit text

CUFWRT402A Write extended stories

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40115 Certificate IV in Advertising	BSB40107 Certificate IV in Advertising	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40215 Certificate IV in Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suited to those working as administrators and project officers. In this role, individuals 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 = 10

1 core unit plus

9 elective units, of which:

- 5 elective units must be selected from the elective units listed below
- 4 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

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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

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Elective Units

BSBADM405 Organise meetings

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBCON401 Work effectively in a business continuity context

BSBEBU401 Review and maintain a website

BSBFIA402 Report on financial activity

BSBINN301 Promote innovation in a team environment

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

BSBIPR405 Protect and use intangible assets in small business

BSBITA401 Design databases

BSBITS401 Maintain business technology

BSBITU401 Design and develop complex text documents

BSBITU402 Develop and use complex spreadsheets

BSBITU404 Produce complex desktop published documents

BSBLED401 Develop teams and individuals

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBPMG522 Undertake project work

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BSBRKG402 Provide information from and about records

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40215 Certificate IV in Business	BSB40212 Certificate IV in Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40315 Certificate IV in Customer Engagement

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals with excellent communication and interpersonal skills who undertake complex customer interactions, often as a team leader and with significant authority to delegate.

Duties at this level are varied and may include responding to complex customer requests handling complaints, coaching staff and completing related administrative 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 = 13

3 core units plus

10 elective units, of which:

- 4 units must be from Group A elective units below
- 6 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course
- up to 2 units may be from a Certificate III level qualification.

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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

BSBCUS401 Coordinate implementation of customer service strategies

BSBLED401 Develop teams and individuals

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Elective Units

Group A

BSBCUE403 Schedule customer engagement activity

BSBCUE404 Collect, analyse and record information

BSBCUE405 Survey stakeholders to gather and record information

BSBCUE406 Run a multicentre

BSBCUE407 Administer customer engagement technology

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBMGT401 Show leadership in the workplace

BSBMKG402 Analyse consumer behaviour for specific markets

BSBWOR403 Manage stress in the workplace

Group B

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

BSBHRM405 Support the recruitment, selection and induction of staff

BSBINM401 Implement workplace information system

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BSBINN301 Promote innovation in a team environment

BSBLDR402 Lead effective workplace relationships

BSBLED501 Develop a workplace learning environment

BSBMGT402 Implement operational plan

BSBMGT403 Implement continuous improvement

BSBMGT405 Provide personal leadership

BSBPMG411 Apply project quality management techniques

BSBPMG415 Apply project risk management techniques

BSBPMG522 Undertake project work

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS301 Implement and monitor environmentally sustainable work practices

CHCINF505D Meet statutory and organisation information requirements

CHCPOL403C Undertake research activities

ICTSAS305 Provide ICT advice to clients

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40315 Certificate IV in Customer Engagement	BSB40312 Certificate IV in Customer Contact	Updated to meet Standards for Training Packages. Title changed to reflect industry practice.	Equivalent qualification

Links

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

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BSB40415 Certificate IV in Small Business Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for small business managers who use well-developed skills and a broad knowledge base to solve a range of defined 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:

- all 6 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- 1 elective unit may be selected from a Certificate III or Diploma qualification, if not listed below.

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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

BSBSMB401 Establish legal and risk management requirements of small business

BSBSMB402 Plan small business finances

BSBSMB403 Market the small business

BSBSMB404 Undertake small business planning

Elective Units

BSBCRT501 Originate and develop concepts

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBEBU401 Review and maintain a website

BSBFIA402 Report on financial activity

BSBFRA401 Manage compliance with franchisee obligations and legislative requirements

BSBINN301 Promote innovation in a team environment

BSBINT303 Organise the importing and exporting of goods

BSBIPR405 Protect and use intangible assets in small business

BSBMGT404 Lead and facilitate off-site staff

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBPMG522 Undertake project work

BSBREL401 Establish networks

BSBREL402 Build client relationships and business networks

BSBRES401 Analyse and present research information

BSBSMB405 Monitor and manage small business operations

BSBSMB406 Manage small business finances

BSBSMB407 Manage a small team

BSBSMB408 Manage personal, family, cultural and business obligations

BSBSMB409 Build and maintain relationships with small business stakeholders

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BSBSMB410 Review and implement energy efficiency in business operations

BSBSMB411 Manage specialist external advisory services

BSBSMB412 Introduce cloud computing into business operations

BSBSUS301 Implement and monitor environmentally sustainable work practices

FNSACC406 Set up and operate a computerised accounting system

PSPGOV407B Provide a quotation

SIRXQUA002A Lead a team to foster innovation

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40415 Certificate IV in Small Business Management	BSB40407 Certificate IV in Small Business Management	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40515 Certificate IV in Business Administration

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suited to a range of individuals who use well-developed administrative skills and a broad knowledge base in a wide variety of administrative contexts. They 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.

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

This qualification has no core units

10 elective units, of which:

- 5 elective units must be selected from the Group A units listed below
- 5 elective units may be selected from the Group A or Group B units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 elective unit may be selected from either a Certificate III or Diploma qualification

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- BSBITU307 Develop keyboarding speed and accuracy cannot be selected as an elective unit for this qualification.

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.

Elective Units

Group A units

BSBADM401 Produce complex texts from shorthand notes

BSBADM405 Organise meetings

BSBADM406 Organise business travel

BSBADM411 Produce complex texts from audio transcription

BSBFIA401 Prepare financial reports

BSBINM401 Implement workplace information system

BSBITA401 Design databases

BSBITU401 Design and develop complex text documents

BSBITU402 Develop and use complex spreadsheets

BSBITU404 Produce complex desktop published documents

BSBWRT401 Write complex documents

Group B units

BSBADM407 Administer projects

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBEBU401 Review and maintain a website

BSBFIA402 Report on financial activity

BSBINN301 Promote innovation in a team environment

BSBITS401 Maintain business technology

BSBMKG413 Promote products and services

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BSBMKG414 Undertake marketing activities

BSBMED401 Manage patient record keeping system

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40515 Certificate IV in Business Administration	BSB40507 Certificate IV in Business Administration	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40615 Certificate IV in Business Sales

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals with well-developed sales skills across a range of business sales contexts. They may problem-solve, provide leadership to others and analyse a range of information. Typically, people in this role would report to a more senior business sales practitioner.

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
- 2 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate III or Diploma level.

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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

BSBPRO401 Develop product knowledge

BSBREL402 Build client relationships and business networks

BSBSLS407 Identify and plan sales prospects

BSBSLS408 Present, secure and support sales solutions

Elective Units

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBFIA402 Report on financial activity

BSBADM405 Organise meetings

BSBADM406 Organise business travel

BSBADM409 Coordinate business resources

BSBINT401 Research international business opportunities

BSBCMM401 Make a presentation

BSBITU301 Create and use databases

BSBITU402 Develop and use complex spreadsheets

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBMKG401 Profile the market

BSBMKG402 Analyse consumer behaviour for specific markets

BSBMKG408 Conduct market research

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBMKG415 Research international markets

BSBMKG416 Market goods and services internationally

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBREL401 Establish networks

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BSBREL403 Implement international client relationship strategies

BSBRES401 Analyse and present research information

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS301 Implement and monitor environmentally sustainable work practices

FNSSAM402 Implement a sales plan

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40615 Certificate IV in Business Sales	BSB40610 Certificate IV in Business Sales	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40715 Certificate IV in Franchising

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for franchisees operating one or more sites of a franchise operation within any industry sector. In this role, individuals apply well-developed skills and have managerial responsibilities for the franchise and the relationship with a franchisor.

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

3 core units plus

7 elective units, of which:

- at least 5 elective units must be selected from the elective units listed below
- the remaining elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

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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

BSBFRA401 Manage compliance with franchisee obligations and legislative requirements

BSBFRA402 Establish a franchise

BSBFRA403 Manage relationship with franchisor

Elective Units

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCRT501 Originate and develop concepts

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBFIA402 Report on financial activity

BSBFRA301 Work within a franchise

BSBFRA404 Manage a multiple site franchise

BSBIPR405 Protect and use intangible assets in small business

BSBITS401 Maintain business technology

BSBITU401 Design and develop complex text documents

BSBLED401 Develop teams and individuals

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

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Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40715 Certificate IV in Franchising	BSB40707 Certificate IV in Franchising	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB40915 Certificate IV in Governance

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification would be suited to board members and coordinators of quality governance. They would apply a broad knowledge of the business and contribute their skills and knowledge to monitoring and guiding the activities of the organisation at a board level.

Individuals in these roles would solve problems, analyse information and 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 = 10

3 core units plus

7 elective units, of which:

- 4 elective units must be selected from the elective units listed below
- 3 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from a Certificate III or Diploma qualification.

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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.

Units selected from other Training Packages must not duplicate units selected from or available within the BSB Business Services Training Package.

Core Units

BSBGOV401 Implement Board member responsibilities

BSBGOV402 Work within organisational structure

BSBGOV403 Analyse financial reports and budgets

Elective Units

BSBADM502 Manage meetings

BSBDIV301 Work effectively with diversity

BSBPMG416 Apply project procurement procedures

BSBREL401 Establish networks

BSBRSK401 Identify risk and apply risk management processes

BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business

BSBSMB404 Undertake small business planning

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB40915 Certificate IV in Governance	BSB40907 Certificate IV in Governance	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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BSB41015 Certificate IV in Human Resources

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals working in a range of human resources management positions. Job roles could include human resources assistants, human resources coordinators, human resources administrators and payroll officers.

Workplace responsibilities would be determined at a workplace level. Some smaller business may require employees to work across all aspects of human resources. In larger companies, individuals may just have responsibility for a singular aspect of human resources such as remuneration.

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

6 core units plus

4 elective units, of which:

- at least 2 units must be from the elective units listed below
- up to 2 units may be from an accredited course or any endorsed Training Package at Certificate III level or above.

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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

BSBHRM403 Support performance-management processes

BSBHRM404 Review human resources functions

BSBHRM405 Support the recruitment, selection and induction of staff

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBLDR402 Lead effective workplace relationships

BSBWRK411 Support employee and industrial relations procedures

Elective Units

BSBADM405 Organise meetings

BSBCMM401 Make a presentation

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

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

BSBFIA302 Process payroll

BSBFIA402 Report on financial activity

BSBINM401 Implement workplace information system

BSBINN301 Promote innovation in a team environment

BSBITU304 Produce spreadsheets

BSBITU401 Design and develop complex text documents

BSBITU402 Develop and use complex spreadsheets

BSBITU404 Produce complex desktop published documents

BSBLDR403 Lead team effectiveness

BSBLED401 Develop teams and individuals

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BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRKG404 Monitor and maintain records in an online environment

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

TAEDEL301A Provide work skill instruction

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB41015 Certificate IV in Human Resources	BSB41013 Certificate IV in Human Resources	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41115 Certificate IV in International Trade

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals employing well-developed international trade skills in a wide variety of contexts. Job roles could include export customer service coordinators, exporters, importers and trade coordinators.

They would be adept problem-solvers, could analyse a wide variety of information and may be responsible for the work of others. In most cases, they would report to a more senior international trade/business practitioner.

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

This qualification has no core units.

10 elective units, of which:

- 4 elective units must be selected from the Group A units listed below
- 3 elective units must be selected from the Group B units listed below

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- 3 elective units may be selected from the remaining Group A or Group B units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

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.

Elective Units

Group A units

BSBCOM405 Promote compliance with legislation

BSBINT401 Research international business opportunities

BSBINT405 Apply knowledge of import and export international conventions, laws and finance

BSBINT407 Prepare business advice on export Free on Board Value

BSBINT408 Prepare business advice on the taxes and duties for international trade transactions

BSBINT409 Plan for international trade

BSBMKG415 Research international markets

BSBMKG416 Market goods and services internationally

BSBREL403 Implement international client relationship strategies

Group B units

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBFIA402 Report on financial activity

BSBINM401 Implement workplace information system

BSBITS401 Maintain business technology

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BSBITU401 Design and develop complex text documents

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBLED401 Develop teams and individuals

BSBMGT401 Show leadership in the workplace

BSBMGT402 Implement operational plan

BSBMGT403 Implement continuous improvement

BSBMGT404 Lead and facilitate off-site staff

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB41115 Certificate IV in International Trade	BSB41107 Certificate IV in International Trade	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41315 Certificate IV in Marketing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for those who use well-developed marketing skills across a variety of contexts. Job titles might include direct marketing officers, market research assistants, marketing coordinators, marketing officers and public relations officers.

They are often adept problem solvers, can analyse information well and may have some limited responsibility for others. In most cases, individuals would usually report to a more senior marketing practitioner.

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:

- 3 of the elective units must be selected from the elective units listed below
- 3 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level

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- if not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

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

BSBCMM401 Make a presentation

BSBMKG401 Profile the market

BSBMKG402 Analyse consumer behaviour for specific markets

BSBMKG408 Conduct market research

Elective Units

BSBADV405 Perform media calculations

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBEBU401 Review and maintain a website

BSBFIM501 Manage budgets and financial plans

BSBINT401 Research international business opportunities

BSBITA401 Design databases

BSBITU301 Create and use databases

BSBLDR402 Lead effective workplace relationships

BSBMKG409 Design direct response offers

BSBMKG410 Test direct marketing activities

BSBMKG411 Analyse direct marketing databases

BSBMKG412 Conduct e-marketing communications

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBMKG415 Research international markets

BSBMKG416 Market goods and services internationally

BSBPRO401 Develop product knowledge

BSBPUB401 Develop and apply knowledge of public relations industry

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BSBPUB402 Develop public relations campaigns

BSBPUB403 Develop public relations documents

BSBREL401 Establish networks

BSBREL402 Build client relationships and business networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSLS407 Identify and plan sales prospects

BSBSLS408 Present, secure and support sales solutions

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB41315 Certificate IV in Marketing	BSB41307 Certificate IV in Marketing	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41415 Certificate IV in Work Health and Safety

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for people working in a Work Health and Safety (WHS) role who work to provide leadership and guidance to others and have some limited responsibility for the output of others.

The qualification reflects the role of workers who apply a broad knowledge base and well developed skills in a wide variety of contexts and may include coordinators, advisors and facilitators.

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:

- at least 3 units must be from Group A below
- the remaining units may be from Group A, Group B or any currently endorsed Training Package or accredited course at the same qualification level

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- if not listed below, 1 elective unit may be selected from a Certificate III or 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 AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core Units

BSBWHS402 Assist with compliance with WHS laws

BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes

BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control

BSBWHS405 Contribute to implementing and maintaining WHS management systems

BSBWHS406 Assist with responding to incidents

Elective Units

Group A

BSBCMM401 Make a presentation

BSBPMG522 Undertake project work

BSBRES401 Analyse and present research information

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs

BSBWHS408 Assist with effective WHS management of contractors

BSBWHS409 Assist with workplace monitoring processes

BSBWHS410 Contribute to work-related health and safety measures and initiatives

PUAWER002B Ensure workplace emergency prevention procedures, systems and processes are implemented

Group B

BSBINN301 Promote innovation in a team environment

BSBMGT401 Show leadership in the workplace

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BSBMGT403 Implement continuous improvement

BSBWRT401 Write complex documents

TAEASS301B Contribute to assessment

TAEDEL301A Provide work skill instruction

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB41415 Certificate IV in Work Health and Safety	BSB41412 Certificate IV in Work Health and Safety	Updated to meet Standards for Training Packages. Changed Assessment conditions. Assessors for BSBWHS402 Assist with compliance with WHS laws must hold a WHS qualification or equivalent at Diploma level or higher.	Equivalent qualification

Links

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

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BSB41515 Certificate IV in Project Management Practice

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for autonomous individuals who identify and apply project management skills and knowledge in a wide variety of contexts. Job titles for these roles may include contracts officers, project administrators, quality officers and small business operators.

Individuals in these roles 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:

- at least 3 units must be from Group A below

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- the remaining units may be from Group A, Group B or any endorsed Training Package or accredited course at Certificate IV level or higher.

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. They must not include the choice of the unit BSBPMG522 Undertake project work.

Core Units

BSBPMG409 Apply project scope-management techniques

BSBPMG410 Apply project time-management techniques

BSBPMG411 Apply project quality-management techniques

Elective Units

Group A

BSBPMG412 Apply project cost-management techniques

BSBPMG413 Apply project human resources management approaches

BSBPMG414 Apply project information management and communications techniques

BSBPMG415 Apply project risk-management techniques

BSBPMG416 Apply project procurement procedures

BSBPMG417 Apply project life cycle management processes

Group B

BSBADM405 Organise meetings

BSBCUE405 Survey stakeholders to gather and record information

BSBLEG415 Apply the principles of contract law

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

CPPDSM4047A Implement and monitor procurement process

MSAENV472B Implement and monitor environmentally sustainable work practices

PSPETHC401A Uphold and support the values and principles of public service

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PSPGOV422A Apply government processes

PSPPOL404A Support policy implementation

TLIE4006A Collect, analyse and present workplace data and information

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB41515 Certificate IV in Project Management Practice	BSB41513 Certificate IV in Project Management Practice	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41615 Certificate IV in Purchasing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals working in a range of roles including purchasing officers, stock control officers, purchasing assistants and inventory administrators.

They may work in any industry or organisational setting and may be responsible for all or a part of a procurement life cycle. Typically those completing this qualification would report to a purchasing manager or contract 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 = 10

3 core units plus

7 elective units, of which:

- 5 elective units must be selected from the elective units listed below
- 2 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 elective unit may be selected from either a Certificate III or Diploma qualification.

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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

BSBITU305 Conduct online transactions

BSBPUR401 Plan purchasing

BSBPUR402 Negotiate contracts

Elective Units

BSBADM409 Coordinate business resources

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBFIA402 Report on financial activity

BSBITU401 Design and develop complex text documents

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBPUR403 Conduct international purchasing

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

PSPGOV406B Gather and analyse information

PSPPROC406B Procure goods and services

PSPPROC411A Plan procurement

PSPPROC412A Develop and distribute requests for offers

PSPPROC413A Select providers and develop contracts

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB41615 Certificate IV in Purchasing	BSB41607 Certificate IV in Purchasing	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41715 Certificate IV in Recordkeeping

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for those working as records and information officers in a broad range of contexts. Individuals in these roles apply well-developed recordkeeping skills and a broad knowledge base. They may use problem-solving skills, analyse information and provide guidance for others in the workplace.

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 the elective units listed below or from an equivalent level qualification within the BSB Business Services Training Package
- 4 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level.
- if not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

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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

BSBRKG401 Review the status of a record

BSBRKG402 Provide information from and about records

BSBRKG403 Set up a business or records system for a small business

BSBRKG404 Monitor and maintain records in an online environment

Elective Units

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBEBU401 Review and maintain a website

BSBFIA402 Report on financial activity

BSBINN301 Promote innovation in a team environment

BSBITS401 Maintain business technology

BSBITU401 Design and develop complex text documents

BSBLDR403 Lead team effectiveness

BSBLED401 Develop teams and individuals

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBMED401 Manage patient record keeping system

BSBPMG522 Undertake project work

BSBREL401 Establish networks

BSBRES401 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWRT401 Write complex documents

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB41715 Certificate IV in Recordkeeping	BSB41707 Certificate IV in Recordkeeping	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB41915 Certificate IV in Business (Governance)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for 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 the elective units listed below

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- 2 units may be selected from the elective units listed below, from elsewhere in this Training Package, or from any other currently endorsed Training Package or accredited course at this qualification level, or Certificate III or Diploma level.

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

BSBATSIC411 Communicate with the community

BSBATSIL408 Manage a board meeting

BSBATSIL412 Participate effectively as a board member

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

BSBRES401 Analyse and present research information

BSBSUS301 Implement and monitor environmentally sustainable work practices

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSB41915 Certificate IV in Business (Governance)	BSB41907 Certificate IV in Business (Governance)	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB42015 Certificate IV in Leadership and Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0

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 provide leadership, guidance and support to others. They also have some responsibility for organising and monitoring the output of their team.

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

4 core units plus

8 elective units, of which:

- 4 units must be from Group A
- up to 4 units may be additional units selected from Group A
- up to 4 units may be selected from Group B

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- if not listed below, 1 unit may be from any currently endorsed Training Package at Certificate IV level or above OR any accredited course at Certificate IV level.

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

BSBLDR401 Communicate effectively as a workplace leader

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBMGT402 Implement operational plan

Elective Units

Group A

BSBFIA402 Report on financial activity

BSBINN301 Promote innovation in a team environment

BSBLDR404 Lead a diverse workforce

BSBMGT403 Implement continuous improvement

BSBREL402 Build client relationships and business networks

BSBRSK401 Identify risk and apply risk management processes

BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

BSBWOR404 Develop work priorities

TAEDEL404A Mentor in the workplace

Group B

BSBADM409 Coordinate business resources

BSBCMM401 Make a presentation

BSBCOM406 Conduct work within a compliance framework

BSBCRT401 Articulate, present and debate ideas

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBCUS403 Implement customer service standards

BSBINM401 Implement workplace information system

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BSBINT401 Research international business opportunities

BSBIPR401 Use and respect copyright

BSBIPR403 Protect and use brands and business identity

BSBLED401 Develop teams and individuals

BSBMGT401 Show leadership in the workplace

BSBMGT404 Lead and facilitate off-site staff

BSBMGT407 Apply digital solutions to work processes

BSBMKG413 Promote products and services

BSBPMG522 Undertake project work

BSBRES401 Analyse and present research information

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB42015 Certificate IV in Leadership and Management	BSB40812 Certificate IV in Frontline Management	Updated to meet Standards for Training Packages Two new core units Changes to grouping and number of electives offered Number of electives required increased from six to	No equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
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Links

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

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BSB42215 Certificate IV in Legal Services

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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 service settings. They apply solutions to a 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

8 core units plus

4 elective units, of which:

- 4 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 elective unit may be selected from either a Certificate III or Diploma qualification.

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.

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Core Units

BSBCMM402 Implement effective communication strategies

BSBCOM406 Conduct work within a compliance framework

BSBLEG413 Identify and apply the legal framework

BSBLEG414 Establish and maintain a file in legal services

BSBLEG418 Produce complex legal documents

BSBLEG415 Apply the principles of contract law

BSBLEG416 Apply the principles of the law of torts

BSBRES404 Research legal information using primary sources

Elective Units

BSBINN501 Establish systems that support innovation

BSBINN502 Build and sustain an innovative work environment

BSBLEG403 Maintain trust accounts

BSBLEG417 Apply the principles of evidence law

BSBSUS201 Participate in environmentally sustainable work practices

BSBSUS301 Implement and monitor environmentally sustainable work practices

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB42215 Certificate IV in Legal Services	BSB40110 Certificate IV in Legal Services	Updated to meet Standards for Training Packages.	Equivalent qualification

Links

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

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BSB50115 Diploma of Advertising

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification would apply to individuals with various job titles including account managers, creative directors, copywriters and account planners.

Individuals in these roles would possess a sound theoretical knowledge base in advertising management and demonstrate a range of managerial skills to ensure that advertising functions are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff and lead teams in conducting advertising campaigns.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 5 elective units must be selected from the Group A elective units below
- at least 2 elective units must be selected from either the remaining Group A or Group B units listed below, or from an equivalent level qualification in BSB Business Services Training Package
- 1 elective unit may be selected from the units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

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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.

Elective Units

Group A

BSBADV503 Coordinate advertising research

BSBADV507 Develop a media plan

BSBADV509 Create mass print media advertisements

BSBADV510 Create mass electronic media advertisements

BSBMKG523 Design and develop an integrated marketing communication plan

BSBCMM401 Make a presentation

BSBCRT501 Originate and develop concepts

BSBFIM501 Manage budgets and financial plans

BSBWRT501 Write persuasive copy

Group B

BSBADV602 Develop an advertising campaign

BSBADV603 Manage advertising production

BSBADV604 Execute an advertising campaign

BSBADV605 Evaluate campaign effectiveness

BSBCUS501 Manage quality customer service

BSBDES601 Manage design realisation

BSBDES602 Research global design trends

BSBINM501 Manage an information or knowledge management system

BSBLED501 Develop a workplace learning environment

BSBMGT502 Manage people performance

BSBMGT517 Manage operational plan

BSBMGT516 Facilitate continuous improvement

BSBMKG402 Analyse consumer behaviour for specific markets

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

BSBMKG506 Plan market research

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BSBMKG507 Interpret market trends and developments

BSBMKG508 Plan direct marketing activities

BSBMKG509 Implement and monitor direct marketing activities

BSBMKG510 Plan e-marketing communications

BSBMKG514 Implement and monitor marketing activities

BSBMKG515 Conduct a marketing audit

BSBMKG520 Manage compliance within the marketing legislative framework

BSBMKG522 Plan measurement of marketing effectiveness

BSBPUB501 Manage the public relations publication process

BSBPUB502 Develop and manage complex public relations campaigns

BSBPUB503 Manage fundraising and sponsorship activities

BSBPUB504 Develop and implement crisis management plans

BSBPMG522 Undertake project work

BSBREL501 Build international client relationships

BSBREL502 Build international business networks

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB50115 Diploma of Advertising	BSB50107 Diploma of Advertising	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB50215 Diploma of Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification would apply to individuals with various job titles including executive officers, program consultants and program coordinators.

Individuals in these roles may possess substantial experience in a range of settings, but seek to further develop their skills across a wide range of business functions.

Conversely, it may also apply to those with little or no vocational experience, but who possess sound theoretical business skills and knowledge that they would like to develop in order to create further educational and employment opportunities.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 6 of the elective units must be selected from the units listed below, with no more than 3 units selected from any one group

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- 2 elective units may be selected from elective units listed below, from the BSB Business Services Training Package, or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

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.

Elective Units

Group A

BSBADV503 Coordinate advertising research

BSBADV507 Develop a media plan

BSBADV509 Create mass print media advertisements

BSBADV510 Create mass electronic media advertisements

BSBMKG523 Design and develop an integrated marketing communication plan

BSBWRT501 Write persuasive copy

Group B

BSBADM502 Manage meetings

BSBADM503 Plan and manage conferences

BSBADM504 Plan and implement administrative systems

BSBADM506 Manage business document design and development

BSBEBU501 Investigate and design e-business solutions

BSBFIM502 Manage payroll

BSBITB501 Establish and maintain a workgroup computer network

Group C

BSBHRM501 Manage human resources services

BSBHRM502 Manage human resources management information systems

BSBHRM513 Manage workforce planning

BSBHRM505 Manage remuneration and employee benefits

BSBHRM506 Manage recruitment, selection and induction processes

BSBHRM507 Manage separation or termination

BSBHRM509 Manage rehabilitation or return-to-work programs

BSBHRM510 Manage mediation processes

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BSBLED502 Manage programs that promote personal effectiveness

Group D

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

BSBMKG506 Plan market research

BSBMKG507 Interpret market trends and developments

BSBMKG508 Plan direct marketing activities

BSBMKG509 Implement and monitor direct marketing activities

BSBMKG510 Plan e-marketing communications

BSBMKG514 Implement and monitor marketing activities

BSBMKG515 Conduct a marketing audit

BSBPUB501 Manage the public relations publication process

BSBPUB502 Develop and manage complex public relations campaigns

BSBPUB503 Manage fundraising and sponsorship activities

BSBPUB504 Develop and implement crisis management plans

Group E

BSBCON601 Develop and maintain business continuity plans

BSBINM501 Manage an information or knowledge management system

BSBINN501 Establish systems that support innovation

BSBINN502 Build and sustain an innovative work environment

BSBIPR501 Manage intellectual property to protect and grow business

BSBMGT403 Implement continuous improvement

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR501 Manage personal work priorities and professional development

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50215 Diploma of Business	BSB50207 Diploma of Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB50315 Diploma of Customer Engagement

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification would apply to individuals with various job titles including contact centre managers, quality assurance officers, analysts, schedulers and customer contact managers.

Individuals in these roles would possess sound relationship management skills and be well-equipped to support a team. They would typically manage complex multi-channel customer interactions including training others and promoting continuous process improvements within an organisation.

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

3 core units plus

7 elective units, of which:

- 2 units must be from Group A elective units below
- 5 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course
- up to 2 units may be from a Certificate IV level qualification.

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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

BSBCUE504 Integrate customer contact operations in the organisation

BSBLED501 Develop a workplace learning environment

BSBMGT516 Facilitate continuous improvement

Elective Units

Group A

BSBAUD501 Initiate a quality audit

BSBCUE501 Develop business continuity strategy

BSBCUE502 Establish a multicentre

BSBCUE503 Manage data interrogation

BSBCUE601 Optimise customer engagement operations

BSBCUE602 Manage customer engagement information

BSBCUE603 Design and launch new customer engagement facilities

BSBCUE604 Develop and maintain a service level strategy

BSBCUE605 Develop and maintain a customer engagement marketing strategy

BSBCUE606 Forecast and plan using customer engagement traffic information analysis

BSBCUE607 Manage customer engagement centre staffing

BSBCUE608 Manage customer engagement operational costs

BSBCUS501 Manage quality customer service

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

Group B

BSBCUE403 Schedule customer engagement activity

BSBCUE407 Administer customer engagement technology

BSBCOM501 Identify and interpret compliance requirements

BSBCOM502 Evaluate and review compliance

BSBCOM503 Develop processes for the management of breaches in compliance requirements

BSBCOM601 Research compliance requirements and issues

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BSBCOM602 Develop and create compliance requirements

BSBCOM603 Plan and establish compliance management systems

BSBDIV601 Develop and implement diversity policy

BSBHRM405 Support the recruitment, selection and induction of staff

BSBHRM512 Develop and manage performance-management processes

BSBHRM604 Manage employee relations

BSBINM501 Manage an information or knowledge management system

BSBINN502 Build and sustain an innovative work environment

BSBITA601 Configure and optimise customer contact technology

BSBLED502 Manage programs that promote personal effectiveness

BSBLDR801 Lead personal and strategic transformation

BSBMGT605 Provide leadership across the organisation

BSBMGT615 Contribute to organisation development

BSBMGT618 Develop a contact centre business plan

BSBMKG610 Develop, implement and monitor a marketing campaign

BSBWHS501 Ensure a safe workplace

BSBPUB504 Develop and implement crisis management plans

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR403 Manage stress in the workplace

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB50315 Diploma of Customer Engagement	BSB50311 Diploma of Customer Contact	Updated to meet Standards for Training Packages Title changed to reflect	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
		industry practice	

Links

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BSB50415 Diploma of Business Administration

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification would apply to individuals with various job titles including administration managers, general office managers and office managers. Individuals in these roles may possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and/or the work of 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 = 8

This qualification has no core units

8 elective units, of which:

- 5 elective units must be selected from the Group A units listed below
- 3 elective units may be selected from the Group B units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate IV or Advanced Diploma qualification.

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.

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Elective Units

Group A

BSBADM502 Manage meetings

BSBADM503 Plan and manage conferences

BSBADM504 Plan and implement administrative systems

BSBADM506 Manage business document design and development

BSBFIM502 Manage payroll

BSBITB501 Establish and maintain a workgroup computer network

BSBPMG522 Undertake project work

Group B units

BSBCUS501 Manage quality customer service

BSBINM501 Manage an information or knowledge management system

BSBINN301 Promote innovation in a team environment

BSBMGT502 Manage people performance

BSBRKG502 Manage and monitor business or records systems

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50415 Diploma of Business Administration	BSB50407 Diploma of Business Administration	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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BSB50515 Diploma of Franchising

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who act as franchisors. A franchisor licenses trademarks, and tried and proven methods of doing business to a franchisee in exchange for a recurring payment, and usually a percentage piece of gross sales or gross profits as well as the annual fees.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 4 units must be selected from the Group A units listed below
- 2 units may be additional units from Group A
- 2 units may be selected from the Group B units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, one unit may be selected from either a Certificate IV or an Advanced Diploma qualification.

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.

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Elective Units

Group A

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

Group B units

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBINM501 Manage an information or knowledge management system

BSBIPR501 Manage intellectual property to protect and grow business

BSBLED501 Develop a workplace learning environment

BSBMGT502 Manage people performance

BSBMGT517 Manage operational plan

BSBMGT516 Facilitate continuous improvement

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS501 Ensure a safe workplace

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50515 Diploma of Franchising	BSB50507 Diploma of Franchising	Updated to meet Standards for Training Packages	Equivalent qualification

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BSB50615 Diploma of Human Resources Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working in a variety of roles within the human resources sector who have a sound theoretical knowledge base in human resources management and demonstrate a range of managerial skills to ensure that human resources functions are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff.

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

6 core units plus

3 elective units, of which:

- at least 2 units must be from the elective units listed below
- if not listed below, 1 unit may be from any endorsed Training Package or accredited course at Certificate IV level or above.

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.

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Core Units

BSBHRM501 Manage human resources services

BSBHRM506 Manage recruitment selection and induction processes

BSBHRM512 Develop and manage performance-management processes

BSBHRM513 Manage workforce planning

BSBWRK510 Implement and monitor WHS policies, procedures and programs to meet

BSBWHS401 legislative requirements

Elective Units

BSBDIV501 Manage diversity in the workplace

BSBFIM501 Manage budgets and financial plans

BSBFIM502 Manage payroll

BSBHRM502 Manage human resources management information systems

BSBHRM505 Manage remuneration and employee benefits

BSBHRM507 Manage separation or termination

BSBHRM509 Manage rehabilitation or return to work programs

BSBHRM510 Manage mediation processes

BSBHRM511 Manage expatriate staff

BSBINM501 Manage an information or knowledge management system

BSBINN601 Lead and manage organisational change

BSBITU402 Develop and use complex spreadsheets

BSBLED501 Develop a workplace learning environment

BSBLED502 Manage programs that promote personal effectiveness

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBPMG522 Undertake project work

BSBRKG502 Manage and monitor business or records system

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS501 Ensure a safe workplace

BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50615 Diploma of Human Resources Management	BSB50613 Diploma of Human Resources Management	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB50715 Diploma of Business (Governance)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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 the elective units listed below
- 2 units may be selected from the elective units listed below, from elsewhere in this Training Package, or from any other currently endorsed Training Package or accredited course at this qualification level, or Certificate IV or Advanced Diploma level
- if selecting the unit PSPGOV507A 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.

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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

BSBATSIL510 Appoint and work with a manager

BSBATSIL511 Lead the organisation's strategic planning cycle

BSBATSIL503 Manage conflict

BSBATSIM505 Control organisational finances

BSBATSIM506 Develop employment policies

Elective Units

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

BSBSUS501 Develop workplace policy and procedures for sustainability

PSPGOV507A Undertake negotiations

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50715 Diploma of Business (Governance)	BSB50710 Diploma of Business (Governance)	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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BSB50815 Diploma of International Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working in various positions across a variety of industry sectors who possess a sound theoretical knowledge base in international business management. They may demonstrate a range of managerial skills to ensure that international business activities are conducted effectively in an organisation or business area. Typically they would have responsibility for the work of other staff and lead teams in conducting international 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 = 8

This qualification has no core units.

8 elective units must be selected, of which:

- 5 elective units must be selected from the Group A units listed below
- 1 elective unit must be selected from either the Group A units or Group B units listed below
- 2 elective units may be selected from the Group A or Group B units listed below, from this Training Package, or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

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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.

Elective Units

Group A

BSBFIA501 Report on finances related to international business

BSBMKG511 Analyse data from international markets

BSBMKG512 Forecast international market and business needs

BSBMKG513 Promote products and services to international markets

BSBMKG516 Profile international markets

BSBMKG517 Analyse consumer behaviour for specific international markets

BSBREL501 Build international client relationships

BSBREL502 Build international business networks

Group B

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBINM501 Manage an information or knowledge management system

BSBINN501 Establish systems that support innovation

BSBINN502 Build and sustain an innovative work environment

BSBLED501 Develop a workplace learning environment

BSBMGT502 Manage people performance

BSBMGT517 Manage operational plan

BSBMGT516 Facilitate continuous improvement

BSBPMG521 Manage project integration

BSBPMG511 Manage project scope

BSBPMG512 Manage project time

BSBPMG513 Manage project quality

BSBPMG514 Manage project costs

BSBPMG515 Manage project human resources

BSBPMG516 Manage project information and communications

BSBPMG517 Manage project risk

BSBPMG518 Manage project procurement

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BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS501 Ensure a safe workplace

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB50815 Diploma of International Business	BSB50807 Diploma of International Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB51215 Diploma of Marketing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working in a variety of marketing roles across different industry sectors who possess a sound theoretical knowledge base and demonstrate a range of managerial skills. Typically they would have responsibility for the work of other staff and lead teams in conducting marketing campaigns.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 5 elective units must be selected from the Group A elective units below
- at least 2 elective units must be selected from the Group B elective units below
- 1 elective unit may be selected from the remaining Group A or Group B units, from this Training Package, or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

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.

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Elective Units

Group A

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

BSBMKG506 Plan market research

BSBMKG507 Interpret market trends and developments

BSBMKG514 Implement and monitor marketing activities

BSBMKG515 Conduct a marketing audit

Group B

BSBADV507 Develop a media plan

BSBFIA501 Report on finances related to international business

BSBFIM501 Manage budgets and financial plans

BSBMKG409 Design direct response offers

BSBMKG508 Plan direct marketing activities

BSBMKG509 Implement and monitor direct marketing activities

BSBMKG510 Plan e-marketing communications

BSBMKG511 Analyse data from international markets

BSBMKG512 Forecast international market and business needs

BSBMKG513 Promote products and services to international markets

BSBMKG516 Profile international markets

BSBMKG517 Analyse consumer behaviour for specific international markets

BSBMKG518 Plan and implement services marketing

BSBMKG519 Plan and implement business-to-business marketing

BSBMKG520 Manage compliance within the marketing legislative framework

BSBMKG521 Plan and implement sponsorship and event marketing

BSBMKG522 Plan measurement of marketing effectiveness

BSBMKG523 Design and develop an integrated marketing communication plan

BSBPUB501 Manage the public relations publication process

BSBPUB502 Develop and manage complex public relations campaigns

BSBPUB503 Manage fundraising and sponsorship activities

BSBPUB504 Develop and implement crisis management plans

BSBREL501 Build international client relationships

BSBREL502 Build international business networks

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BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWRT501 Write persuasive copy

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB51215 Diploma of Marketing	BSB51207 Diploma of Marketing	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB51315 Diploma of Work Health and Safety

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0

Qualification Description

This qualification is suitable for people who coordinate and maintain the Work Health and Safety (WHS) program in an organisation. It reflects the role of practitioners 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 core units in BSB41415 Certificate IV in Work Health and Safety or equivalent competencies.

Equivalent competencies are predecessors to the following units which have been mapped as equivalent:

- BSBWHS402 Assist with compliance with WHS laws
- BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes
- BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control
- BSBWHS405 Contribute to implementing and maintaining WHS management systems
- BSBWHS406 Assist with responding to incidents

Packaging Rules

Total number of units = 9

5 core units plus

4 elective units, of which:

- at least 3 units must be Group A below

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- the remaining unit may be from Group A or Group B below or any currently endorsed Training Package or accredited course at Certificate IV, Diploma or Advanced Diploma level.

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

BSBWHS502 Manage effective WHS consultation and participation processes

BSBWHS503 Contribute to the systematic management of WHS risk

BSBWHS504 Manage WHS risks

BSBWHS505 Investigate WHS incidents

BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems

Elective Units

Group A

BSBHRM509 Manage rehabilitation or return to work programs

BSBWHS410 Contribute to work-related health and safety measures and initiatives

BSBWHS507 Contribute to managing WHS information systems

BSBWHS508 Manage WHS hazards associated with plant

BSBWHS509 Facilitate the development and use of risk-management tools

BSBWHS510 Contribute to implementing emergency procedures

CHCFAM504C Respond to and contain critical incidents

PUAWER003B Manage and monitor workplace emergency procedures, equipment and other resources

Group B

BSBINN601 Lead and manage organisational change

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS408 Assist with effective WHS management of contractors

BSBWHS409 Assist with workplace monitoring processes

TAEDEL401A Plan, organise and deliver group-based learning

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB51315 Diploma of Work Health and Safety	BSB51312 Diploma of Work Health and Safety	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB51415 Diploma of Project Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who apply project management skills and knowledge. They may manage projects in a variety of contexts, across a number of industry sectors. They 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:

- **4 elective units** may be selected from the elective units listed below or any endorsed Training Package or accredited course at Diploma level or higher.

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. They must not include the choice of the unit BSBPMG522 Undertake project work.

Core Units

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BSBPMG511 Manage project scope

BSBPMG512 Manage project time

BSBPMG513 Manage project quality

BSBPMG514 Manage project cost

BSBPMG515 Manage project human resources

BSBPMG516 Manage project information and communication

BSBPMG517 Manage project risk

BSBPMG521 Manage project integration

Elective Units

BSBINM501 Manage an information or knowledge management system

BSBINN502 Build and sustain an innovative work environment

BSBMGT516 Facilitate continuous improvement

BSBPMG518 Manage project procurement

BSBPMG519 Manage project stakeholder engagement

BSBPMG520 Manage project governance

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

ICTICT511 Match ICT needs with the strategic direction of the enterprise

ICTICT515 Verify client business requirements

MSS015002A Develop strategies for more sustainable use of resources

PSPETHC501B Promote the values and ethos of public service

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB51415 Diploma of Project Management	BSB51413 Diploma of Project Management	Updated to meet Standards for Training	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
		Packages	

Links

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BSB51515 Diploma of Purchasing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is suitable for individuals working in a variety of industries or organisational settings who possess a sound theoretical knowledge base in purchasing. They may demonstrate a range of managerial skills to ensure that purchasing activities are conducted effectively. Typically, they would have responsibility for the work of other staff. They may have whole of procurement life cycle responsibilities or work in specific functions such as contract management or tendering.

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

5 core units plus

3 elective units, of which:

- 2 elective units must be selected from the elective units listed below
- the remaining 1 elective unit may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate IV or Advanced Diploma qualification.

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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

BSBPUR501 Develop, implement and review purchasing strategies

BSBPUR502 Manage supplier relationships

BSBPUR504 Manage a supply chain

BSBRKG502 Manage and monitor business or records systems

BSBRSK501 Manage risk

Elective Units

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBINM501 Manage an information or knowledge management system

BSBLED501 Develop a workplace learning environment

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBPUR503 Manage international purchasing

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS501 Ensure a safe workplace

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

PSPPROC503B Manage contract performance

PSPPROC504B Finalise contracts

PSPPROC506A Plan to manage a contract

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB51515 Diploma of Purchasing	BSB51507 Diploma of Purchasing	Updated to meet Standards for	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
		Training Packages	

Links

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BSB51615 Diploma of Quality Auditing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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, carry out and evaluate their own work and/or the work of a team. They may work as quality assurance managers, quality facilitators, quality and improvement consultants or service quality system support analysts.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 3 elective units must be selected from the Group A units listed below
- 2 elective units must be selected from the Group A or Group B units listed below or from an equivalent level qualification within this Training Package
- 3 elective units may be selected from the Group A or Group B units listed below, or any currently endorsed Training Package, or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate IV or Advanced Diploma qualification.

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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.

Elective Units

Group A

BSBAUD402 Participate in a quality audit

BSBAUD501 Initiate a quality audit

BSBAUD503 Lead a quality audit

BSBAUD504 Report on a quality audit

BSBINM501 Manage an information or knowledge management system

BSBRSK501 Manage risk

Group B

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBPMG513 Manage project quality

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB51615 Diploma of Quality Auditing	BSB51607 Diploma of Quality Auditing	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB51715 Diploma of Recordkeeping

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in information and records management and use a range of specialised, technical or managerial competencies to ensure that business or records systems function effectively within an organisation. Typically they work with a high degree of autonomy as supervisors, team leaders and coordinators.

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:

- 2 elective units must be selected from the elective units listed below or from an equivalent level qualification within this Training Package
- 3 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from either a Certificate IV or Advanced Diploma qualification.

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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

BSBRKG502 Manage and monitor business or records systems

BSBRKG505 Document or reconstruct a business or records system

BSBRKG506 Develop and maintain terminology and classification schemes

Elective Units

BSBADM502 Manage meetings

BSBADM506 Manage business document design and development

BSBCUS501 Manage quality customer service

BSBINM501 Manage an information or knowledge management system

BSBINN301 Promote innovation in a team environment

BSBMGT502 Manage people performance

BSBMGT517 Manage operational plan

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB51715 Diploma of Recordkeeping	BSB51707 Diploma of Recordkeeping	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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BSB51915 Diploma of Leadership and Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0

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 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

4 core units *plus*

8 elective units, of which:

- 4 elective units must be selected from Group A
- up to 4 may be additional units from Group A or Group B

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- if not listed below, up to 2 electives may be from Diploma or above in the Business Services Training Package
- if not listed below, 1 elective unit may be from any currently endorsed Training Package or accredited course at Diploma level.

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

BSBLDR501 Develop and use emotional intelligence

BSBMGT517 Manage operational plan

BSBLDR502 Lead and manage effective workplace relationships

BSBWOR502 Lead and manage team effectiveness

Elective Units

Group A

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBHRM405 Support the recruitment, selection and induction staff

BSBINN502 Build and sustain an innovative work environment

BSBIPR501 Manage intellectual property to protect and grow business

BSBLDR503 Communicate with influence

BSBLDR504 Manage diversity in the workplace

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBMGT518 Develop organisation policy

BSBMGT519 Incorporate digital solutions into plans and practices

BSBMGT520 Plan and manage the flexible workforce

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBWHS501 Ensure a safe workplace

BSBWOR501 Manage personal work priorities and professional development

Group B

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BSBADM502 Manage meetings

BSBCOM503 Develop processes for the management of breaches in compliance requirements

BSBFRA502 Manage a franchise operation

BSBHRM511 Manage expatriate staff

BSBHRM512 Develop and manage performance-management processes

BSBHRM513 Manage workforce planning

BSBINM501 Manage an information or knowledge management system

BSBINN501 Establish systems that support innovation

BSBLED501 Develop a workplace learning environment

BSBMGT521 Plan, implement and review a quality assurance program

BSBMKG507 Interpret market trends and developments

BSBMKG512 Forecast international market and business needs

BSBREL502 Build international business networks

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWRK510 Manage employee relations

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB51915 Diploma of Leadership and Management	BSB51107 Diploma of Management	Updated to meet Standards for Training Packages Structure of qualification changed from elective only to core and elective Number of units required increased from 8 to 12	No equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status

Links

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

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BSB52015 Diploma of Conveyancing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is designed to reflect the role of persons carrying out conveyancing work in a range of environments. At this level individuals are expected to apply theoretical and specialist skills in a range of situations and to display initiative and judgement. They work autonomously and can be responsible for planning, coordinating and evaluating the work of others within broad but generally well-defined parameters.

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 = 13

9 core units plus

4 elective units, of which:

- 2 electives must be selected from the listed electives
- 2 elective units may be additional units from the listed electives, or any currently endorsed Training Package, or accredited course at Certificate IV, Diploma or Advanced Diploma level.

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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

FNSACC403 Make decisions in a legal context

BSBCNV501 Take instructions in relation to a transaction

BSBCNV502 Read and interpret a legal document and provide advice

BSBCNV503 Analyse and interpret legal requirements for a transaction

BSBCNV504 Prepare legal documents

BSBCNV505 Finalise the conveyancing transaction

BSBCNV506 Establish and manage a trust account

BSBLEG415 Apply the principles of contract law

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

Elective Units

BSBCNV601 Identify and conduct searches

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBHRM506 Manage recruitment selection and induction processes

BSBINM601 Manage knowledge and information

BSBITS401 Maintain business technology

BSBLDR402 Lead effective workplace relationships

BSBLEG416 Apply the principles of the law of torts

BSBLEG417 Apply the principles of evidence law

BSBLEG512 Apply legal principles in property law matters

BSBMGT502 Manage people performance

BSBMGT517 Manage operational plan

BSBMGT516 Facilitate continuous improvement

BSBMGT605 Provide leadership across the organisation

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control

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BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

TAEDEL402A Plan, organise and facilitate learning in the workplace

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB52015 Diploma of Conveyancing	FNS50411 Diploma of Conveyancing	Updated to meet Standards for training packages Qualification moved from Financial Services Training Package to Business Services Training Package.	Equivalent qualification

Links

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

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BSB52215 Diploma of Legal Services

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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.

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
- 2 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 elective unit may be selected from either a Certificate IV or Advanced Diploma qualification.

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.

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Core Units

BSBCOM501 Identify and interpret compliance requirements

BSBCMM501 Develop and nurture relationships

BSBLED503 Maintain and enhance professional practice

BSBRES502 Research legal information using secondary sources

Elective Units

BSBLEG510 Apply legal principles in family law matters

BSBLEG511 Apply legal principles in criminal law matters

BSBLEG512 Apply legal principles in property law matters

BSBLEG513 Apply legal principles in corporation law matters

BSBLEG514 Assist with civil procedure

BSBLEG515 Apply legal principles in wills and probate matters

BSBSUS301 Implement and monitor environmentally sustainable work practices

BSBSUS501 Develop workplace policy and procedures for sustainability

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB52215 Diploma of Legal Services	BSB50110 Diploma of Legal Services	Updated to meet Standards for Training Packages.	Equivalent qualification

Links

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

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BSB60115 Advanced Diploma of Advertising

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals who provide leadership and strategic direction for the advertising activities of an organisation. Working as account directors, account planning managers, client services executives/directors, these people analyse, design and execute judgements using wide-ranging technical, creative, conceptual and managerial competencies. Their knowledge base may be highly specialised or broad within the advertising field. These individuals are often accountable for group outcomes and for the overall performance of the advertising function in an organisation.

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

5 core units plus

3 elective units, of which:

- 2 of the elective units must be selected from the elective units listed below
- 1 elective unit may be selected from the elective units listed below, any endorsed Training Package or current accredited course at Diploma level or above.

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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

BSBADV602 Develop an advertising campaign

BSBADV603 Manage advertising production

BSBADV604 Execute an advertising campaign

BSBADV605 Evaluate campaign effectiveness

BSBMKG523 Design and develop an integrated marketing communication plan

Elective Units

BSBCOM603 Plan and establish compliance management systems

BSBCRT501 Originate and develop concepts

BSBDES601 Manage design realisation

BSBDES602 Research global design trends

BSBDIV601 Develop and implement diversity policy

BSBFIM601 Manage finances

BSBHRM602 Manage human resources strategic planning

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBMGT605 Provide leadership across the organisation

BSBMGT608 Manage innovation and continuous improvement

BSBMGT615 Contribute to organisation development

BSBMGT616 Develop and implement strategic plans

BSBMGT617 Develop and implement a business plan

BSBMKG611 Manage measurement of marketing effectiveness

BSBMKG603 Manage the marketing process

BSBMKG607 Manage market research

BSBMKG608 Develop organisational marketing objectives

BSBMKG609 Develop a marketing plan

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS605 Develop, implement and maintain WHS management systems

PSPGOV602B Establish and maintain strategic networks

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PSPPROC607A Manage strategic contracts

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB60115 Advanced Diploma of Advertising	BSB60110 Advanced Diploma of Advertising	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB60215 Advanced Diploma of Business

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals with significant experience in a senior administrative role who are seeking to develop expertise across a wider range of business functions.

The qualification is suited to individuals who possess significant theoretical business skills and knowledge and wish to consolidate and build pathways to further educational or employment opportunities.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 6 elective units must be selected from the list below, with no more than 3 units selected from any one group
- 2 elective units may be selected from the units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Diploma level.

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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.

Elective Units

Group A

BSBADV602 Develop an advertising campaign

BSBADV603 Manage advertising production

BSBADV604 Execute an advertising campaign

BSBADV605 Evaluate campaign effectiveness

Group B

BSBHRM602 Manage human resources strategic planning

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBMGT615 Contribute to organisation development

Group C

BSBMKG603 Manage the marketing process

BSBMKG605 Evaluate international marketing opportunities

BSBMKG606 Manage international marketing programs

BSBMKG607 Manage market research

BSBMKG608 Develop organisational marketing objectives

BSBMKG609 Develop a marketing plan

Group D

BSBCON801 Establish and review the business continuity management framework and strategies

BSBFIM601 Manage finances

BSBINM601 Manage knowledge and information

BSBIPR601 Develop and implement strategies for intellectual property management

BSBSUS501 Develop workplace policy and procedures for sustainability

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Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB60215 Advanced Diploma of Business	BSB60207 Advanced Diploma of Business	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB60515 Advanced Diploma of Marketing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working as marketing directors, marketing strategists and national, regional or global marketing managers. Individuals in these positions provide leadership and strategic direction in the marketing activities of an organisation. They analyse, design and execute judgements using wide-ranging technical, creative, conceptual and managerial competencies. Their knowledge base may be highly specialised or broad within the marketing field. These individuals are often accountable for group outcomes and for the overall performance of the marketing function of an organisation.

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

4 core units plus

4 elective units, of which:

- at least 3 of the elective units must be selected from the elective units listed below
- 1 elective unit may be selected from elective units listed below, from this Training Package, or from any current accredited course or endorsed Training Package at this qualification level or Diploma level.

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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

BSBMKG603 Manage the marketing process

BSBMKG607 Manage market research

BSBMKG608 Develop organisational marketing objectives

BSBMKG609 Develop a marketing plan

Elective Units

BSBMKG523 Design and develop an integrated marketing communication plan

BSBCOM603 Plan and establish compliance management systems

BSBDIV601 Develop and implement diversity policy

BSBFIM601 Manage finances

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBMGT605 Provide leadership across the organisation

BSBMGT608 Manage innovation and continuous improvement

BSBMGT616 Develop and implement strategic plans

BSBMGT617 Develop and implement a business plan

BSBMKG520 Manage compliance within the marketing legislative framework

BSBMKG605 Evaluate international marketing opportunities

BSBMKG606 Manage international marketing programs

BSBMKG611 Manage measurement of marketing effectiveness

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS605 Develop, implement and maintain WHS management systems

PSPGOV602B Establish and maintain strategic networks

PSPPROC607A Manage strategic contracts

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Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB60515 Advanced Diploma of Marketing	BSB60507 Advanced Diploma of Marketing	Updated to meet Standards for Training Packages	Equivalent qualification

Links

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

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BSB60615 Advanced Diploma of Work Health and Safety

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0

Qualification Description

This qualification is suitable for people who apply advanced practical knowledge to coordinate, facilitate and maintain the Work Health and Safety (WHS) program in one or more fields of work in an organisation, such as a WHS practitioner or HR practitioner. They may work under the guidance of an occupational health and safety professional.

Licensing/Regulatory Information

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

Entry Requirements

All core units from BSB51315 Diploma of Work Health and Safety or equivalent competencies. Equivalent competencies are predecessors to the following units which have been mapped as equivalent:

- BSBWHS502 Manage effective WHS consultation and participation processes
- BSBWHS503 Contribute to the systematic management of WHS risk
- BSBWHS504 Manage WHS risks
- BSBWHS505 Investigate WHS incidents
- BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems

Packaging Rules

Total number of units = 8

5 core units plus

3 elective units, of which:

- 1 elective unit must be from the listed electives

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- up to 2 electives may selected from the listed electives, or from any currently endorsed Training Package or accredited course at Advanced Diploma level
- if not listed, 1 elective unit may be selected from a Diploma of 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 AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core Units

BSBWHS601 Apply legislative frameworks for WHS

BSBWHS602 Facilitate WHS activities

BSBWHS603 Implement WHS risk management

BSBWHS604 Evaluate the WHS performance of organisations

BSBWHS605 Develop, implement and maintain WHS management systems

Elective Units

BSBINN601 Lead and manage organisational change

BSBMGT616 Develop and implement strategic plans

BSBPMG522 Undertake project work

BSBWHS606 Conduct a WHS audit

BSBWHS607 Apply ergonomics to manage WHS risks

BSBWHS608 Assist with applying occupational hygiene to manage WHS risks

BSBWHS609 Advise on the application of safe design principles to control WHS risks

BSBMGT608 Manage innovation and continuous improvement **OR** CHCORG501B Facilitate workplace change and innovation

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB60615 Advanced Diploma of Work Health	BSB60612 Advanced Diploma of Work Health	Updated to meet Standards for Training	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
and Safety	and Safety	Packages	

Links

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BSB60815 Advanced Diploma of Recordkeeping

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of records and information consultants and managers who have a detailed understanding and specialist knowledge of business or records systems. They may provide strategic direction for business or records systems in larger organisations with responsibility for a team. They may also be individuals with sole responsibility for business or records systems in smaller organisations.

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

This qualification has no core units.

8 elective units must be selected, of which:

- 5 elective units must be selected from the Group A units listed below
- 3 elective units may be selected from the Group A or Group B units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 unit may be selected from a Diploma qualification.

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.

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Elective Units

Group A

BSBRKG601 Define recordkeeping framework

BSBRKG603 Prepare a functional analysis for an organisation

BSBRKG604 Determine security and access rules and procedures

BSBRKG605 Determine records requirements to document a function

BSBRKG606 Design a records retention and disposal schedule

BSBRKG607 Document and monitor the record-creating context

BSBRKG608 Plan management of records over time

Group B

BSBCOM603 Plan and establish compliance management systems

BSBDIV601 Develop and implement diversity policy

BSBINM601 Lead and manage organisational change

BSBINN502 Build and sustain an innovative work environment

BSBINN601 Lead and manage organisational change

BSBFIM601 Manage finances

BSBMGT605 Provide leadership across the organisation

BSBMGT608 Manage innovation and continuous improvement

BSBMGT615 Contribute to organisation development

BSBMGT616 Develop and implement strategic plans

BSBMGT617 Develop and implement a business plan

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS605 Develop, implement and maintain WHS management systems

PSPGOV602B Establish and maintain strategic networks

PSPPROC607A Manage strategic contracts

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB60815 Advanced	BSB60807 Advanced	Updated to meet	Equivalent

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Code and title current version	Code and title previous version	Comments	Equivalence status
Diploma of Recordkeeping	Diploma of Recordkeeping	Standards for Training Packages	qualification

Links

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

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BSB60915 Advanced Diploma of Management (Human Resources)

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification reflects the role of individuals working as human resources directors, strategists and national regional or global human resources managers. They provide leadership and strategic direction in the human resources activities of an organisation. They analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies. Their knowledge base may be highly specialised or broad within the human resources field. These individuals are often accountable for group outcomes and for the overall performance of the human resources function of an organisation.

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

6 core units plus

2 elective units, of which:

- 2 elective units may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level
- if not listed below, 1 elective unit may be selected from a Diploma qualification.

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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

BSBDIV601 Develop and implement diversity policy

BSBHRM602 Manage human resources strategic planning

BSBINN601 Lead and manage organisational change

BSBMGT605 Provide leadership across the organisation

BSBMGT615 Contribute to organisation development

BSBMGT616 Develop and implement strategic plans

Elective Units

BSBCOM603 Plan and establish compliance management systems

BSBFIM601 Manage finances

BSBINM601 Manage knowledge and information

BSBMGT608 Manage innovation and continuous improvement

BSBMGT617 Develop and implement a business plan

BSBMKG609 Develop a marketing plan

BSBRKG601 Define recordkeeping framework

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS605 Develop, implement and maintain WHS management systems

PSPGOV602B Establish and maintain strategic networks

PSPPROC607A Manage strategic contracts

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB60915 Advanced Diploma of Management (Human Resources)	BSB60907 Advanced Diploma of Management (Human Resources)	Updated to meet Standards for Training Packages	Equivalent qualification

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Links

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

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BSB61015 Advanced Diploma of Leadership and Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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

Nil

Packaging Rules

Total number of units = 12

4 core units *plus*

8 elective units, of which:

- 4 elective units must be selected from the listed electives

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- 4 elective units may be selected from the listed electives or from any currently endorsed Training Package or accredited course at Advanced Diploma level.

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

BSBFIM601 Manage finances

BSBINN601 Lead and manage organisational change

BSBMGT605 Provide leadership across the organisation

BSBMGT617 Develop and implement a business plan

Elective Units

BSBCUE601 Optimise customer engagement operations

BSBCUE602 Manage customer engagement information

BSBCUE603 Design and launch new customer engagement facilities

BSBCUE604 Develop and maintain a service level strategy

BSBCUE605 Develop and maintain a customer engagement marketing strategy

BSBCUE606 Forecast and plan using customer engagement traffic information analysis

BSBCUE607 Manage customer engagement centre staffing

BSBCUE608 Manage customer engagement operational costs

BSBCOM603 Plan and establish compliance management systems

BSBDIV601 Develop and implement diversity policy

BSBHRM602 Manage human resources strategic planning

BSBHRM604 Manage employee relations

BSBINM601 Manage knowledge and information

BSBIPR601 Develop and implement strategies for intellectual property management

BSBMGT608 Manage innovation and continuous improvement

BSBMGT615 Contribute to organisation development

BSBMGT616 Develop and implement strategic plans

BSBMGT619 Identify and implement business innovation

BSBMGT621 Design and manage the enterprise quality management system

BSBMGT622 Manage resources

BSBMGT623 Monitor corporate governance activities

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BSBMGT624 Practice corporate social responsibility

BSBMKG609 Develop a marketing plan

BSBRKG601 Define recordkeeping framework

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS605 Develop, implement and maintain WHS management systems

PSPGOV602B Establish and maintain strategic networks

PSPPROC607A Manage strategic contracts

Qualification Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSB61015 Advanced Diploma of Leadership and Management	BSB60407 Advanced Diploma of Management	Updated to meet Standards for Training Packages Number of units required increased from 8 to 12 Core unit changes and increased from 3 to 4 Elective bank changes and electives increased from 5 to 8	No equivalent qualification

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Links

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

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BSB61115 Advanced Diploma of Conveyancing

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification is designed to reflect the role of conveyancers responsible for conveyancing work, team leadership and/or the management of a practice. At this level individuals are expected to 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 or management functions with accountability for personal outputs and 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 = 18

9 core units plus

9 elective units, of which:

- 6 elective units must be selected from the listed electives
- 3 elective units may be selected from the listed electives, or any currently endorsed Training Package or accredited course at Diploma or Advanced Diploma level.

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.

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Core Units

BSBCNV501 Take instructions in relation to a transaction

BSBCNV502 Read and interpret a legal document and provide advice

BSBCNV503 Analyse and interpret legal requirements for a transaction

BSBCNV504 Prepare legal documents

BSBCNV505 Finalise the conveyancing transaction

BSBCNV506 Establish and manage a trust account

BSBCNV601 Identify and conduct searches

BSBLEG415 Apply the principles of contract law

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

Elective Units

FNSACC403 Make decisions in a legal context

FNSCUS501 Develop and nurture relationships with clients, other professionals and third party referrers

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 regulations

FNSPRM602 Improve the practice

FNSPRM603 Grow the practice

BSBCOM602 Develop and create compliance requirements

BSBCOM603 Plan and establish compliance management systems

BSBCUS501 Manage quality customer service

BSBFIM501 Manage budgets and financial plans

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBITS401 Maintain business technology

BSBLDR402 Lead effective workplace relationships

BSBLEG413 Identify and apply the legal framework

BSBLEG416 Apply the principles of the law of torts

BSBLEG417 Apply the principles of evidence law

BSBLEG512 Apply legal principles in property law matters

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BSBLEG513 Apply legal principles in corporations law matters

BSBMGT605 Provide leadership across the organisation

BSBMGT616 Develop and implement strategic plans

BSBMGT617 Develop and implement a business plan

BSBRSK501 Manage risk

BSBSMB401 Establish legal and risk management requirements of small business

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control

BSBWOR501 Manage personal work priorities and professional development

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB61115 Advanced Diploma of Conveyancing	FNS60311 Advanced Diploma of Conveyancing	Updated to meet Standards for Training Packages Qualification moved from Financial Services Training Package to Business Services Training Package.	Equivalent qualification

Links

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

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BSB61215 Advanced Diploma of Program Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It applies to individuals who are program managers, managing or directing a suite of projects (a program) to achieve organisational objectives.

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 a Diploma of Project Management qualification.

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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:

- at least 6 units must be selected from the elective units listed below
- the remaining elective units may be chosen from the elective units listed below or any endorsed Training Package or accredited course at Advanced Diploma level
- 1 unit may be from any endorsed Training Package or accredited course at Diploma level.

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

BSBPMG610 Enable program execution

BSBPMG611 Facilitate stakeholder engagement

BSBPMG612 Implement program governance

BSBPMG613 Manage benefits

Elective Units

AHCBUS607A Implement a monitoring, evaluation and reporting program

BSBFIM601 Manage finances

BSBINN601 Lead and manage organisational change

BSBLDR501 Develop and use emotional intelligence

BSBMGT520 Plan and manage the flexible workforce

BSBPMG614 Engage in collaborative alliances

BSBPMG615 Manage program delivery

BSBPMG616 Manage program risk

BSBPMG617 Provide leadership for the program

ICTICT602 Develop contracts and manage contracted performance

ICTICT606 Develop communities of practice

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PSPMNGT607B Develop a business case

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB61215 Advanced Diploma of Program Management	BSB60707 Advanced Diploma of Project Management	Updated to meet Standards for Training Packages Number of units required increased from 9 to 12 Structure changed from core only to core and electives Significant changes to units	No equivalent qualification

Links

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

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BSB80215 Graduate Diploma of Strategic Leadership

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

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

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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 must be from the elective units listed below
- 2 units may be from the elective units listed below or any currently endorsed Training Package or accredited course at Graduate Diploma level.

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

BSBLDR801 Lead personal and strategic transformation

BSBLDR802 Lead the strategic planning process for an enterprise

Elective Units

BSBFIM801 Manage financial resources

BSBLDR803 Develop and cultivate collaborative partnerships and relationships

BSBLDR804 Influence and shape diversity management

BSBLDR805 Lead and influence change

BSBLDR806 Lead and influence ethical practice

BSBMGT801 Direct the development of a knowledge management strategy for a business

BSBMGT802 Lead design and review of enterprise systems

BSBMGT803 Use financial and economic information for strategic decision making

BSBRES801 Initiate and lead applied research

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB80215 Graduate Diploma in Strategic Leadership	Not applicable	New qualification	No equivalent qualification

Links

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BSB80315 Graduate Certificate in Leadership Diversity

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification supports workforce diversity leadership and management roles. Individuals undertaking this qualification will typically be managing complex organisational activity, including tending to the training needs of others and promoting continuous process improvements, with full delegatory authority, in the capacity of a manager or a leader.

This qualification reflects the role of skilled operators who apply a broad range of competencies in professional work contexts, using discretion and judgement and relevant researched theoretical knowledge.

This qualification focuses on making provision for inclusivity to ensure that training, employment and promotional opportunities are provided to all cohorts of the Australian population.

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 Bachelor degree in related fields of study.

or

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Have completed a Diploma or Advanced Diploma qualification 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 three 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 = 4

4 core units

This qualification has no elective units.

Core Units

BSBDIV801 Conduct strategic diversity workforce planning

BSBDIV802 Conduct strategic planning for diversity learning practices

BSBLDR804 Influence and shape diversity management

BSBLDR801 Lead personal and strategic transformation

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB80315 Graduate Certificate in Leadership Diversity	Not applicable	New Qualification	No equivalent qualification

Links

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

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BSB80415 Graduate Diploma of Portfolio Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 1.0.

Qualification Description

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

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 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 project or program leadership and management responsibility and/or complexity in an enterprise.

or

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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 listed electives
- 2 elective units may be selected from the listed electives or any endorsed Training Package or accredited course at Graduate Diploma level.

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

BSBPMG801 Prioritise projects and programs

BSBPMG802 Select and balance the portfolio

BSBPMG803 Manage and review portfolio performance

BSBPMG804 Govern the portfolio

Elective Units

BSBLDR801 Lead personal and strategic transformation

BSBLDR803 Develop and cultivate collaborative partnerships and relationships

BSBLDR805 Lead and influence change

BSBLDR806 Lead and influence ethical practice

BSBMGT802 Lead design and review of enterprise systems

BSBMGT803 Use financial and economic information for strategic decision making

BSBPMG805 Lead the portfolio

BSBPMG806 Manage portfolio communications and change

BSBPMG807 Manage portfolio resources

BSBPMG808 Manage portfolio risk

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Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB80415 Graduate Diploma of Portfolio Management	Not applicable	New qualification	No equivalent qualification

Links

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

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BSBADM101 Use business equipment and resources

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 choose equipment and resources to complete a variety of tasks under direct supervision.

It applies to individuals looking to develop the basic skills and knowledge required to use a variety of business equipment.

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

Unit Sector

Administration – General Administration

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 Select equipment or resources	1.1 Identify and access business equipment or resources required to complete the task under direct instructions 1.2 Estimate quantities and resources correctly to complete the task 1.3 Check equipment for serviceability in accordance with equipment instructions
2 Operate equipment	2.1 Operate equipment in accordance with manufacturer's specifications and under direct instructions 2.2 Identify equipment faults accurately and take action to ensure

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ELEMENT	PERFORMANCE CRITERIA
	equipment is repaired in accordance with manufacturer's specifications 2.3 Report repairs outside area of own responsibility to appropriate persons
3 Maintain equipment or resources	3.1 Maintain equipment or resources to support completion of tasks under direct instructions 3.2 Undertake maintenance to ensure equipment meets manufacturer's specifications 3.3 Maintain records concerning equipment or resources under direct instructions 3.4 Store equipment and resources under direct instructions

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, 2.1, 3.3	• Comprehends and follows instructions in familiar texts
Writing	3.3	• Records and updates documents according to instructions
Oral Communication	1.1, 2.3, 3.1, 3.4	• Comprehends simple instructions • Asks clarifying questions and responds to answers
Numeracy	1.2	• Uses rounding and other mathematical techniques to estimate quantity requirements
Navigate the world of work	2.3	• Follows organisational procedures when tasks are beyond own level of responsibility
Get the work done	1.1, 1.2, 1.3, 2.2, 3.1-3.4	• Follows clearly defined instructions provided by others • Completes routine tasks taking some limited responsibility for decisions regarding equipment and resource choices, operation and maintenance • Responds to routine problems by referring to instructions or standard procedures

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Range of Conditions

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBADM101 Use business equipment and resources	BSBADM101A Use business equipment and resources	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

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Assessment Requirements for BSBADM101 Use business equipment and resources

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 equipment and resources required for tasks
- operate equipment according to manufacturer or organisational requirements
- report faults according to organisational requirements
- maintain equipment and records according to instructions.

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 functions of available business equipment
- list the key points in operating the available business equipment safely and correctly
- identify common equipment faults
- describe how to maintain and store equipment and resources.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- operational and maintenance manuals
- organisational procedures related to operation and maintenance of equipment
- records relating to resources
- case studies and, where possible, real situations.

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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

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BSBADM301 Produce texts from shorthand notes

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 take shorthand from a dictation source at 60 words (or more) per minute, in accordance with the current Australian Standard for shorthand speed, and to produce an accurate text from the notes.

It applies to individuals employed in a range of work environments who produce notes and texts from oral or printed sources using shorthand techniques. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

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

Unit Sector

Administration – General Administration

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 Take dictation using shorthand	1.1 Identify organisational and task requirements relating to style, presentation and storage of documents prior to commencing the task 1.2 Clarify purpose and requirements of text with the author/speaker 1.3 Record shorthand notes from a dictation source at a minimum

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ELEMENT	PERFORMANCE CRITERIA
	speed of 60 words per minute 1.4 Clarify meaning and spelling of unusual names or terms to ensure accuracy of the notes 1.5 Self-check shorthand notes for accuracy
2 Transcribe shorthand notes	2.1 Produce text from shorthand notes to at least 98% accuracy 2.2 Produce text within designated time lines
3 Edit and revise text	3.1 Self-check final text for accuracy, spelling, grammar, punctuation and formatting 3.2 Revise, format, print, name and store text in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1, 1.4, 1.5, 2.1, 2.2, 3.1, 3.2	• Identifies and interprets information from organisational policies and procedures • Comprehends texts incorporating symbols • Proofreads own notes against originals to check for accuracy
Writing	1.3, 1.4, 2.1, 2.2, 3.2	• Prepares texts from notes using appropriate structure and style • Edits own work to ensure accuracy
Oral Communication	1.2, 1.3,1.4	• Listens for relevant information and asks questions to confirm job requirements • Participates in spoken exchanges using structure and language to suit the audience
Numeracy	1.3, 2.1, 2.2	• Performs calculations required to measure output against timeframes
Navigate the world of work	1.1, 3.2	• Takes some personal responsibility for adherence to organisational procedures
Get the work done	1.1, 3.2	• Plans a range of routine tasks, accepting goals and delivering work according to predetermined deadlines

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		• Takes responsibility for routine low-impact decisions within familiar situations • Uses familiar digital systems and tools to access, organise, analyse and display information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM301 Produce texts from shorthand notes	BSBADM301B Produce texts from shorthand notes	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

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Assessment Requirements for BSBADM301 Produce texts from shorthand notes

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:

- record accurate shorthand notes at a minimum speed of 60 words per minute
- produce accurate documents according to organisational and task requirements within timelines and with at least 98% accuracy.

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 organisational requirements for production of documents
- outline how symbols are used in shorthand languages.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment and resources
- shorthand manuals
- English and shorthand dictionaries
- examples of audio sources for transcription and note taking.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBADM302 Produce texts from notes

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 take notes from oral or printed sources to produce accurate text.

It applies to individuals employed in a range of work environments who produce notes and texts from oral and printed sources. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

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

Unit Sector

Administration – General Administration

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 Take notes	1.1 Identify organisational requirements relating to style, presentation and storage of documents prior to commencing the task 1.2 Clarify the purpose and requirements of the text with author/speaker 1.3 Record notes with the required degree of accuracy from appropriate sources

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Clarify meaning and spelling of names or technical terms to ensure accuracy of the notes 1.5 Self-check notes for accuracy
2 Transcribe notes	2.1 Produce text from notes to the required degree of accuracy and to reflect the meaning intended by the author/speaker 2.2 Produce text within designated time lines
3 Edit and revise text	3.1 Self-check final text for accuracy and grammar, and ensure syntax is appropriate for the intended purpose and audience of the text 3.2 Revise, format, name, store and print text in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1, 1.3-1.5, 2.1, 3.1, 3.2	• Interprets textual information to establish job requirements • Proofreads own work to ensure language elements meet audience and organisational expectations
Writing	1.3-1.5, 2.1, 2.2, 3.1, 3.2	• Prepares a range of texts using appropriate language and structure to communicate relevant information effectively • Edits and corrects own work to ensure accuracy and consistency
Oral Communication	1.2, 1.3, 1.4	• Uses listening skills to confirm understanding of requirements • Participates in verbal exchanges using appropriate tone and language
Numeracy	2.2	• Uses basic arithmetic to ensure work is completed according to workplace deadlines
Navigate the world of work	1.1, 3.2	• Takes some personal responsibility for adherence to organisational procedures and protocols

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Get the work done	1.1, 3.2	• Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines • Takes responsibility for routine low-impact decisions within familiar situations • Uses familiar digital systems and tools to access, organise and display information

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.

Appropriate sources must include:	• Oral sources • Written sources

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM302 Produce texts from notes	BSBADM302B Produce texts from notes	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

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Assessment Requirements for BSBADM302 Produce texts from notes

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:

- take accurate notes from oral and printed sources according to task requirements
- produce accurate texts from notes that meet workplace requirements and predetermined timelines.

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 methods and techniques for taking notes from oral sources and written sources
- describe organisational requirements for production of documents
- describe the requirements of an organisational style guide.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment and resources
- audio sources for transcription and note taking.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBADM303 Produce texts from audio transcription

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 transcribe from an audio source using keyboarding techniques to produce accurate texts.

It applies to individuals employed in a range of work environments and who may be required to provide administrative support within an enterprise and be responsible for their own output.

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

Unit Sector

Administration – General Administration

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 Prepare for audio transcription	1.1 Identify organisational requirements relating to style, presentation and storage of texts prior to commencing the task 1.2 Clarify purpose and requirements of the text with the author or supervisor
2 Transcribe from an audio source	2.1 Produce text using keyboarding techniques from an audio transcription with the required accuracy 2.2 Predict the meaning of any unclear speech from the context, or clarify with authors

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Ensure text developed from the audio transcription conveys intended meaning 2.4 Clarify the spelling of names or any technical terms and punctuation to ensure accuracy and clarity of the text 2.5 Produce draft text within designated timelines 2.6 Self-check draft text for accuracy
3 Edit and revise text	3.1 Circulate draft for checking in line with requirements of the organisation or originator of the audio transcription 3.2 Incorporate any amendments and self-check final text for accuracy, grammar and appropriateness for intended purpose and audience 3.3 Format, name, store, print and distribute final text in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1, 2.1, 2.3, 2.4, 2.6, 3.3	• Comprehends instructions in organisational and other familiar texts • Proofreads own work to ensure language and structure accurately meets audience and organisational expectations
Writing	2.1-2.6, 3.2, 3.3	• Produces texts in required formats using appropriate grammatical forms and vocabulary to convey meaning • Edits and corrects own work to ensure accuracy and consistency
Oral Communication	1.2, 2.1-2.4	• Uses questioning and listening in verbal exchanges to clarify understanding of task • Recognises the way structure, intonation and vocabulary may change according to the purpose of the oral text
Numeracy	2.5	• Interprets mathematical information related to timeframes

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Navigate the world of work	1.1, 3.1, 3.3	• Takes some personal responsibility for adherence to organisational procedures and protocols
Interact with others	3.1	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 2.1, 2.5, 3.1, 3.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM303 Produce texts from audio transcription	BSBADM303B Produce texts from audio transcription	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

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Assessment Requirements for BSBADM303 Produce texts from audio transcription

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:

- complete the accurate transcription of data
- produce accurate texts from audio sources that meet workplace requirements according to predetermined timelines.

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 various formats and styles of workplace documents
- identify relevant organisational policy and procedures requirements
- outline various types of audio transcriptions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- workplace reference materials such as style guides
- audio-source equipment such as hand-held devices, tape recorders and audio-tapes, dictaphone equipment
- computer equipment including word processing software
- a dictionary.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBADM307 Organise schedules

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 appointments and diaries for personnel within an organisation, using manual and electronic diaries, schedules and other appointment systems.

It applies to individuals 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

Administration – General Administration

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 schedule requirements	1.1 Identify organisational requirements and protocols for diaries and staff planning tools 1.2 Identify organisational procedures for different types of appointments 1.3 Determine personal requirements for diary and schedule items for individual personnel 1.4 Establish appointment priorities and clarify in discussion with

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ELEMENT	PERFORMANCE CRITERIA
	individual personnel
2 Manage schedules	2.1 Identify recurring appointments and deadlines, and schedule these in accordance with individual and organisational requirements 2.2 Establish availability of attendees, and schedule new appointments in accordance with required timelines and diary commitments 2.3 Negotiate alternative arrangements and confirm when established appointments are changed 2.4 Record appointments and manage schedules in accordance with organisational policy 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1, 2.2, 2.4	• Interprets textual information from a range of sources and identifies relevant information
Writing	2.1-2.4	• Uses clear and succinct language to complete and update workplace documentation
Oral Communication	1.1, 1.3, 1.4, 2.3	• Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding
Numeracy	2.1, 2.2	• Makes time estimations and checks logistics when scheduling appointments
Navigate the world of work	1.1, 1.2, 2.1, 2.4	• Recognises and responds to explicit and implicit organisational procedures and protocols
Interact with others	1.3, 1.4, 2.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates and negotiates with others to achieve agreeable outcomes
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.4	• Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined

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		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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM307 Organise schedules	BSBADM307B Organise schedules	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

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Assessment Requirements for BSBADM307 Organise schedules

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:

- appropriately manage the schedules of various individuals through a process of careful planning and negotiation.

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 the key provisions of relevant legislation, standards and codes that affect aspects of business operations or the achievement of team goals
- describe organisational requirements for managing appointments for personnel within the organisation
- summarise the range of appointment systems that could be used
- outline important considerations when managing the schedules of others.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment and resources
- a range of diaries, planners and calendars to record and schedule appointments.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBADM311 Maintain business resources

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, administer and maintain resources and equipment to complete a variety of tasks.

It applies to individuals who are skilled operators and 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 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 – General Administration

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 Advise on resource requirements	1.1 Calculate estimates of future and present business resource needs in accordance with organisational requirements 1.2 Ensure advice is clear, concise and relevant to achieve organisational requirements 1.3 Provide information on the most economical and effective choice of equipment, materials and suppliers

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify resource shortages and possible impact on operations
2 Monitor resource usage and maintenance	2.1 Ensure resource handling is in accordance with established organisational requirements including occupational health and safety requirements 2.2 Use business technology to monitor and identify the effective use of resources 2.3 Use consultation with individuals and teams to facilitate effective decision-making on the appropriate allocation of resources 2.4 Identify and adhere to relevant policies regarding resource use in the performance of operational tasks 2.5 Routinely monitor and compare resource usage with estimated requirements in budget plans
3 Acquire resources	3.1 Ensure acquisition and storage of resources is in accordance with organisational requirements, is cost effective, and consistent with organisational timelines 3.2 Acquire resources within available timelines to meet identified requirements 3.3 Review resource acquisition processes to identify improvements in future resource acquisitions

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, 2.4, 2.5, 3.3	• Identifies and interprets information from a range of sources, including organisational policies and procedures
Writing	1.1, 1.3, 2.2, 2.5, 3.3	• Uses clear and succinct language and appropriate layout to provide information, advice and support materials
Oral Communication	1.2, 1.3, 2.3	• Presents information or advice choosing language appropriate to the context and needs of the audience • Uses active listening and questioning to confirm

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		understanding
Numeracy	1.1, 1.3, 1.4, 2.2, 2.4, 2.5, 3.1-3.3	• Selects and uses appropriate tools to aid with estimation and other resource assessment requirements • Uses a combination of mainly informal and some formal written mathematical equations to represent the outcomes of the resource allocation process
Navigate the world of work	1.1, 1.2, 2.1, 2.4, 3.1, 3.2	• Takes some personal responsibility for adherence to organisational procedures and protocols
Interact with others	2.3	• Uses collaborative techniques to engage personnel in consultations and negotiations
Get the work done	1.1, 1.3, 1.4, 2.2, 2.5, 3.3	• Plans a range of routine tasks and required resources, accepting goals and aiming to achieve them within allocated timeframes • Recognises and takes responsibility for addressing predictable problems in familiar work contexts • Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role • Understands the purpose and some specific functions of some common digital tools used in work contexts • Evaluates effectiveness of decisions in terms of how well they met stated goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM311 Maintain business resources	BSBADM311A Maintain business resources	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

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Assessment Requirements for BSBADM311 Maintain business resources

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:

- collect and record data on resource use
- observe resource use over defined and operational timeframes
- perform routine resource maintenance.

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:

- list the key provisions of relevant legislation
- identify the organisational resource acquisition policies, plans and procedures
- identify the organisational procedures for record keeping/filing systems, security and safe recording practices.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to office equipment and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBADM401 Produce complex texts from shorthand notes

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 take accurate shorthand notes at a minimum speed of 80 words per minute from a variety of sources, including dictation and multiple speakers, and to produce complex texts from shorthand notes.

It applies to individuals employed in a range of work environments and who may be required to provide administrative support within an enterprise and be responsible for the production of their own notes.

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

Unit Sector

Administration – General Administration

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 Take dictation using shorthand	1.1 Identify organisational and task requirements for the style, presentation and storage of documents prior to commencing the task 1.2 Clarify purpose and requirements of required text with the author/speaker 1.3 Record shorthand notes from a dictation source at a minimum speed of 80 words per minute, including using sophisticated

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ELEMENT	PERFORMANCE CRITERIA
	abbreviations 1.4 Clarify meaning and spelling of names and technical terms to ensure accuracy of notes 1.5 Self-check shorthand notes for accuracy
2 Produce complex texts	2.1 Transcribe shorthand notes and produce complex texts to the required degree of accuracy 2.2 Ensure texts contain inserted information, objects and formatting as directed by the dictated source, that reflect the intended meaning 2.3 Produce text within designated timelines
3 Edit and revise texts	3.1 Self-check final text for accuracy 3.2 Revise, format, print, name and distribute or store text in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1, 1.4, 1.5, 2.1, 2.2, 3.1, 3.2	• Identifies and interprets information from organisational policies and procedures • Comprehends texts incorporating symbols • Proofreads own notes to ensure linguistic elements accurately meet audience and organisational expectations
Writing	1.3, 2.1, 2.3, 3.2	• Prepares texts from notes using appropriate structure, accurate spelling, grammar and punctuation • Edits and corrects own work to ensure accuracy
Oral Communication	1.2-1.4, 2.2	• Listens for relevant information and asks questions to confirm task requirements • Recognises structure and tone may change according to the purpose
Numeracy	1.3, 2.3	• Performs calculations required to measure output against timeframes

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Navigate the world of work	1.1, 3.2	• Takes personal responsibility for adherence to organisational procedures and protocols
Get the work done	1.1, 2.2, 2.3, 3.2	• Plans a range of routine tasks accepting goals and aiming to achieve them within allocated timeframes • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM401 Produce complex texts from shorthand notes	BSBADM401B Produce complex texts from shorthand notes	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

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Assessment Requirements for BSBADM401 Produce complex texts from shorthand notes

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:

- take shorthand notes from dictation at a minimum speed of 80 words per minute and at 98% accuracy or above
- complete the accurate transcription of data
- produce complex texts from notes that meet workplace requirements according to predetermined timelines
- ensure final text accurately reflects all organisational and task 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:

- describe the functions and application of appropriate hardware and software
- describe organisational requirements for the production of documents
- summarise how symbols are used in shorthand languages

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment and resources
- samples of audio sources for transcription and note-taking
- an English and a shorthand dictionary.

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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

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BSBADM405 Organise meetings

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 organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation.

It applies to individuals employed in a range of work environments who are required to organise a variety of 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

Administration – General Administration

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 Make meeting arrangements	1.1 Identify the type of meeting being organised and its purpose 1.2 Identify and comply with any legal or ethical requirements 1.3 Identify requirements of the meeting and its participants 1.4 Make meeting arrangements in accordance with meeting and participants requirements 1.5 Advise participants of meeting details

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ELEMENT	PERFORMANCE CRITERIA
2 Prepare and distribute documentation for meetings	2.1 Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements 2.2 Check documentation for accuracy and correct any errors 2.3 Distribute documentation to participants within designated timelines 2.4 Prepare spare sets of documents
3 Record and produce minutes of meeting	3.1 Take notes with the required speed and accuracy to ensure an accurate record of the meeting 3.2 Produce minutes that reflect a true and accurate account of the meeting 3.3 Check minutes for accuracy and submit for approval by the nominated person 3.4 Dispatch copies of minutes 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	Performance Criteria	Description
Reading	1.2,1.4, 2.1, 2.2, 3.3	• Identifies and interprets information from instructions, organisational policies and procedures, or legislation • Compares final output with original notes to check accuracy
Writing	1.4, 1.5, 2.1, 2.2, 3.1, 3.2	• 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	1.3-1.5, 3.1	• 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	2.3, 3.1, 3.4	• Performs calculations required to measure output against predetermined timeframes

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Navigate the world of work	1.2, 1.4, 2.1	• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	2.3, 3.3, 3.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3, 1.4, 2.2-2.4, 3.4	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM405 Organise meetings	BSBADM405B Organise meetings	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

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Assessment Requirements for BSBADM405 Organise meetings

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:

- organise a meeting and advise participants accordingly
- prepare and distribute all documentation required for the meeting
- take meeting notes which accurately reflect what was discussed during the meeting
- produce minutes based on own notes providing an accurate account of the meeting
- circulate copies of meeting minutes within predetermined timeframes.

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 culturally appropriate communication techniques
- identify the relevant formats for agendas and minutes
- list the key provisions of relevant legislation
- outline organisational procedures relevant to the task.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to office equipment and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBADM406 Organise business travel

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 organise domestic and overseas business travel, including developing associated itineraries, booking travel and accommodation, preparing travel related documentation and making travel arrangements.

It applies to individuals employed in a range of work environments who may work providing administrative support within an enterprise, or 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

Administration – General Administration

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 Organise business itinerary for domestic and overseas travel	1.1 Confirm purpose and requirements of domestic or overseas travel including planned itinerary, budget, meeting requirements and traveller preferences 1.2 Identify points of contact and names of contact persons, and make and confirm arrangements for meetings in accordance with planned itinerary 1.3 Prepare daily itineraries with appointments, arrival and

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ELEMENT	PERFORMANCE CRITERIA
	departure times, accommodation and other itinerary details in accordance with travel purpose 1.4 Source, prepare and provide documents and support material for meetings within designated timelines 1.5 Prepare itinerary in accordance with meeting requirements and traveller's work health and safety (WHS) requirements 1.6 Provide itinerary and meeting documents to the traveller within designated timelines
2 Make travel arrangements	2.1 Make bookings in accordance with organisational policies and procedures for business travel 2.2 Identify and arrange travel documents in accordance with itinerary and individual requirements 2.3 Confirm and check travel arrangements and dispatch confirmation documents to the traveller within designated timelines 2.4 Negotiate and confirm alternative arrangements in response to changed requirements 2.5 Record travel details and itinerary in accordance with organisational requirements 2.6 Negotiate and confirm communication arrangements in accordance with organisational requirements
3 Arrange credit facilities	3.1 Check and confirm methods of payment 3.2 Make credit arrangements in accordance with organisational policy 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	Performance Criteria	Description
Reading	1.1-1.5, 2.1-2.3, 3.1, 3.2	• Researches and interprets information from various sources in a range of formats to establish and confirm travel requirements
Writing	1.1-1.5, 2.1-2.3, 2.5,	• Produces clear, detailed and logically organised texts in required format using vocabulary specific to travel

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	3.1, 3.2	requirements
Oral Communication	1.1, 1.2, 2.1, 2.4, 2.6	• Uses appropriate vocabulary, pitch and intonation to convey relevant information • Listens and asks questions to confirm requirements or clarify understanding
Numeracy	1.1, 1.3, 1.4, 1.6, 2.3, 3.1	• Interprets and comprehends a range of everyday mathematical information that is embedded in familiar texts • Uses basic mathematical formula to calculate credit requirements
Navigate the world of world	1.5, 2.1, 2.5, 2.6, 3.2	• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	1.1, 1.4, 1.6, 2.1, 2.3, 2.4, 2.6	• Collaborates and negotiates with others to achieve agreeable outcomes, playing an active role in facilitating agreement • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.6, 2.2, 2.3, 3.1	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • Takes responsibility for the outcomes of routine decisions related directly to own role • Utilises a range of features within digital applications to improve personal productivity, optimising software functions for specific purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM406 Organise business travel	BSBADM406B Organise business travel	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBADM406 Organise business travel

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:

- organise business-related travel for others, including scheduling and developing itineraries and travel-related documents
- finalise all booking and travel arrangements including any necessary credit requirements according to predetermined budgets and time constraints.

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 booking procedures relevant to business travel
- list the key provisions of relevant legislation that may affect aspects of business operations
- summarise organisational policies and procedures required to organise business travel, including use of internet sites and other online resources.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment including telecommunications equipment
- travel-related reference material, such as accommodation and transport suppliers
- appointment books, scheduling software, diaries and other recording and scheduling systems
- preferred suppliers, contact details, websites
- maps.

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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

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BSBADM407 Administer projects

Modification History

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

Application

This unit describes skills and knowledge required to perform the activities associated with the administrative aspects of a project, such as measurement, monitoring, reporting, and winding up the project on completion.

It applies to individuals who work under the supervision of an experienced project manager.

It does not apply to project managers or specialist project managers. For specialist project managers, the units of competency in the Project Management competency field are applicable.

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

Unit Sector

Administration – General Administration

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 Plan project administration	1.1 Identify and record the purpose, scope and objectives of project 1.2 Develop project plans identifying project activities and key administrative milestones and timelines in accordance with the requirements of the project brief/contract and in consultation with

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ELEMENT	PERFORMANCE CRITERIA
	stakeholders 1.3 Identify and address factors that affect timeframes in project planning to ensure timeframes are realistic and achievable 1.4 Link project budgets to key outcomes within projects and incorporate reporting mechanisms to ensure payments are made/received as outcomes are achieved 1.5 Identify monitoring and reporting arrangements for project activities and budgets within project plans in accordance with organisational, statutory and auditing requirements
2 Coordinate project administration	2.1 Allocate and monitor tasks and resources in accordance with project requirements 2.2 Detail project expenditure in financial control systems, and monitor against project budgets in accordance with project plan 2.3 Monitor project timeframes and milestones and report to designated person/s in accordance with organisational requirements 2.4 Maintain project records in accordance with project and organisational requirements
3 Finalise and review project administration	3.1 Identify and complete procedures for winding up projects in accordance with statutory, organisational and auditing requirements 3.2 Review project administration against project plan, measure outcomes, and report on outcomes in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1-1.5, 2.2, 2.3, 3.1, 3.2	• Identifies and interprets complex and non-complex information from organisational and regulatory documents
Writing	1.2, 1.4, 2.2, 3.1, 3.2	• Develops documentation using appropriate structure, accurate spelling, grammar and punctuation

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		• Addresses the context, purpose and audience when generating a range of texts
Oral Communication	1.2	• Engages in discussions using appropriate pitch, volume, intonation and vocabulary appropriate for the audience • Listens closely and asks questions to clarify understanding
Numeracy	1.2-1.5, 2.2, 2.3, 3.1, 3.2	• Extracts, interprets and comprehends mathematical information embedded in documents • Performs calculations necessary to estimate timeframes and monitor progress against predetermined budgets
Navigate the world of work	1.5, 2.3, 2.4, 3.1, 3.2	• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	1.2, 2.1, 2.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1-1.5, 2.1, 2.3, 2.4, 3.2	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • Monitors progress of plans and makes adjustments, if necessary • Makes a range of decisions in different contexts, taking a range of constraints into account • Utilises a range of features within digital applications to improve personal productivity, optimising software functions for specific purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM407 Administer projects	BSBADM407B Administer projects	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBADM407 Administer projects

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:

- Prepare a project scope, schedule and budget which includes a clear communication strategy with reference to all legislative and organisational requirements
- Coordinate a project according to predetermined timeframes and available resources including the production and maintenance of accurate records
- Review and measure outcomes for the project on completion.

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 legislation that may affect aspects of project administration
- summarise relevant organisational policies and procedures for project administration
- outline project planning tools
- explain budgeting strategies used for projects
- identify techniques for project planning and setting milestones.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- workplace project documentation
- relevant enterprise policies and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBADM409 Coordinate business resources

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 and analyse existing and required resources, their effective application and the accountability for their use.

It applies to individuals with a broad knowledge of business resources who contribute well developed skills and knowledge to ensure adequate resources are available to perform the work of the 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

Administration – General Administration

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 Determine resource requirements	1.1 Determine resource requirements in accordance with business and operational plans and organisational requirements 1.2 Provide opportunities to individuals and workgroups to contribute to the identification of resource requirements 1.3 Ensure resource expenditure is realistic and makes efficient use of available budget resources 1.4 Present recommendations on resource requirements in the

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ELEMENT	PERFORMANCE CRITERIA
	required format, style and structure using relevant business equipment and technology
2 Acquire and allocate resources	2.1 Acquire physical resources and services in accordance with organisational requirements 2.2 Check resources to ensure quality and quantity are in line with service agreements 2.3 Allocate resources promptly to enable achievement of workgroup objectives 2.4 Ensure consultation with individuals and teams on allocation of resources is participative and is conducted using appropriate interpersonal skills
3 Monitor and report on resource allocation and usage	3.1 Measure effectiveness of resource planning and assess against actual costs, identified shortfalls and surpluses 3.2 Develop and implement methods of monitoring resource use to enable timely and accurate reporting against business and operational plans 3.3 Identify improvements in resource planning through consultation and feedback, and implement in accordance with organisational requirements 3.4 Maintain records concerning equipment and resource purchases in accordance with 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	Performance Criteria	Description
Reading	1.1, 2.2, 3.1, 3.3, 3.4	• Identifies and interprets information from organisational plans, policies and procedures
Writing	1.4, 2.1, 3.1-3.4	• Develops a range of documents using structure and vocabulary appropriate to audience, context and purpose
Oral Communication	1.2, 2.4, 3.3	• Participates effectively in spoken interactions using active listening and questioning to confirm and clarify understanding

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Numeracy	1.3, 2.2, 3.1, 3.2	• Interprets and comprehends a range of mathematical information that is embedded in familiar texts • Calculates and compares numeric data to track expenditure
Navigate the world of work	1.1, 2.1, 3.3, 3.4	• Recognises and responds to explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	1.2, 1.4, 2.4, 3.3	• 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 active role in facilitating group interaction
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2	• 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 • Utilises a range of features within digital applications to access, store and share information • Reflects on the ways in which variables impact on decision outcomes to identify improvement opportunities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM409 Coordinate business resources	BSBADM409A Coordinate business resources	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

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Assessment Requirements for BSBADM409 Coordinate business resources

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:

- monitor resource usage
- maintain records of resource requirements and usage
- calculate costs and expenditures in relation to use and maintenance of business resources
- acquire and allocate physical resources and services to team members
- consult and communicate with individuals and teams about acquiring and using resources
- monitor, review and report on resource use acquisition, allocation, use and procedures
- follow organisational policies and procedures in relation to business resource acquisition and monitoring.

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 functions of business equipment used in an organisation and identify common faults
- identify organisational policies, plans and procedures in relation to business resource acquisition and monitoring.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- records relating to business resources
- policies and procedures relating to resources

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- 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

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BSBADM411 Produce complex texts from audio transcription

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 transcribe court, parliamentary, police telephone scripts, or medical proceedings and to produce complex and accurate transcriptions within specified timeframes.

It applies to individuals who require specialist skills in word processing and audio transcription. In most cases they would work in an environment where transcription is a central aspect of their work role, but the unit may also apply to experienced administrative staff who use transcription in only part of their role.

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

Unit Sector

Administration – General Administration

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 Prepare for audio transcription	1.1 Prior to commencing the task, identify organisational requirements in the transcription of proceedings in relation to style, presentation and storage of texts 1.2 Clarify with client the purpose and requirements of the transcript and the audio media to be used
2 Transcribe audio tape or	2.1 Use accurate keyboarding skills to transcribe and accurately

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ELEMENT	PERFORMANCE CRITERIA
file	reflect oral proceedings at 70-80 wpm with 98% accuracy 2.2 Review transcript to ensure it presents an accurate and true record of proceedings 2.3 Predict the meaning of unclear speech from the context or clarify with the speaker/author 2.4 Clarify meaning and spelling of names or technical terms to ensure accuracy of the text 2.5 Produce text within designated timelines
3 Edit and revise transcript	3.1 Self-check transcription for accuracy 3.2 Ensure audio transcription reflects speaker's/author's intended meaning 3.3 Edit transcript to ensure grammar, punctuation and syntax are appropriate for intended purpose and audience 3.4 Circulate draft for checking in accordance with organisational and task requirements 3.5 Revise, format, name, store and print transcript in accordance with organisational and 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	Performance Criteria	Description
Reading	1.1, 2.2, 2.4, 3.1-3.3, 3.5	• Comprehends instructions in organisational and other familiar texts • Proofreads texts for sense and accuracy selecting from a range of strategies to aid comprehension when meaning is lost
Writing	2.1, 2.3-2.5, 3.3, 3.5	• Produces texts in required formats using appropriate grammatical forms and vocabulary to convey meaning • Edits and corrects own work to ensure accuracy and consistency
Oral Communication	1.2, 2.1-2.4	• Uses questioning and listening in verbal exchanges to clarify understanding of task • Recognises the way structure, intonation and volume

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		may change according to the purpose of the oral text • Listens and comprehends complex oral texts selecting from a range of strategies to aid comprehension when meaning is lost
Numeracy	2.1, 2.5	• Performs calculations involving percentages required to measure output • Interprets mathematical information related to timeframes
Navigate the world of work	1.1, 3.4, 3.5	• Recognises and responds to both explicit and implicit organisational procedures and protocols
Get the work done	1.1, 2.1, 2.5, 3.3, 3.5	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • 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 • Utilises a range of features within digital applications to improve personal productivity, optimising software functions for specific purposes

Unit Mapping Information

ode and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM411 Produce complex texts from audio transcription	BSBADM411A Produce complex texts from audio transcription	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

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Assessment Requirements for BSBADM411 Produce complex texts from audio transcription

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:

- consider the purpose of the transcript according to client and organisational requirements
- complete the accurate transcription of data demonstrating the required transcribing speed and accuracy
- produce accurate text that meets identified purpose and 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:

- describe organisational requirements for production of complex documents from audio recordings
- identify advanced word processing software functions
- describe basic transcription techniques and principles
- list the key provisions of relevant legislation
- describe specialist terminology used for relevant industries.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- workplace reference materials such as style guides
- tape recorder including audio-tapes
- transcribers or dictaphones for analogue tapes and computer hardware for operating digital audio software

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- computer equipment including word processing software.

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

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BSBADM502 Manage meetings

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 range of meetings including overseeing the meeting preparation processes, chairing meetings, organising the minutes and reporting meeting outcomes.

It applies to individuals employed in a range of work environments who are required to organise and manage meetings within their workplace, including conducting or managing administrative tasks in providing agendas and meeting material. They 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

Administration – General Administration

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 Prepare for meetings	1.1 Develop agenda in line with stated meeting purpose 1.2 Ensure style and structure of meeting are appropriate to its purpose 1.3 Identify meeting participants and notify them in accordance with organisational procedures

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Confirm meeting arrangements in accordance with requirements of meeting 1.5 Despatch meeting papers to participants within designated timelines
2 Conduct meetings	2.1 Chair meetings in accordance with organisational requirements, agreed conventions for type of meeting and legal and ethical requirements 2.2 Conduct meetings to ensure they are focused, time efficient and achieve the required outcomes 2.3 Ensure meeting facilitation enables participation, discussion, problem-solving and resolution of issues 2.4 Brief minute-taker on method for recording meeting notes in accordance with organisational requirements and conventions for type of meeting
3 Follow up meetings	3.1 Check transcribed meeting notes to ensure they reflect a true and accurate record of the meeting and are formatted in accordance with organisational procedures and meeting conventions 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	Performance Criteria	Description
Reading	1.1, 1.2, 1.4, 3.1, 3.2	• Identifies and interprets information from complex texts including legislation, organisational policies and procedures • Compares final output with original notes to check for accuracy
Writing	1.1-1.5, 3.2, 3.3	• Addresses the context, purpose and audience when generating a range of texts • Prepares complex texts from notes using appropriate

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		structure, and accurate spelling, grammar and punctuation • Records notes of meeting proceedings according to organisational requirements • Edits and corrects own work to ensure accuracy
Oral Communication	2.1-2.4	• 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	1.4, 1.5, 3.2, 3.3	• Recognises and interprets numerical information related to timeframes and budgets
Navigate the world of work	1.3, 2.1, 2.4, 3.1, 3.2	• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	1.3, 1.5, 2.3, 3.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Cooperates with others as part of familiar activities, playing an active role in facilitating group interaction
Get the work done	1.1, 1.3, 1.4, 1.5, 2.1, 2.2, 2.4, 3.1, 3.2, 3.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM502 Manage meetings	BSBADM502B Manage meetings	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

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Assessment Requirements for BSBADM502 Manage meetings

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 conventions and procedures for formal and informal meetings including:
  - developing and distributing agendas and papers
  - identifying and inviting meeting participants
  - organising and confirming meeting arrangements
  - running the meeting and following up
- organise, take part in and chair a meeting
- record and store meeting documentation
- follow organisational policies and procedures.

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 meeting terminology, structures, arrangements
- outline responsibilities of the chairperson and explain group dynamics in relation to managing meetings
- describe options for meetings including face-to-face, teleconferencing, web-conferencing and using webcams
- identify the relevant organisational procedures and policies regarding meetings, chairing and minutes including identifying organisational formats for minutes and agendas.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

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- reference material in regard to meeting venues and technology, catering and transport suppliers
- organisational policies and procedures for managing meetings
- office supplies and equipment
- computers and relevant software
- 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

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BSBADM503 Plan and manage conferences

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, promote and coordinate conferences, ensuring follow-up procedures are incorporated.

It applies to individuals employed in a range of work environments who are required to plan and manage conferences. They may work as senior administrative staff, or may be other individuals who have been delegated responsibility for planning and managing a conference.

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

Unit Sector

Administration – General Administration

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 Plan conference	1.1 Confirm purpose, required outcomes and style of conference with conference convenor/s 1.2 Confirm conference facilities requirements, budget, and preparation timeline with conference convenor/s 1.3 Identify speakers/presenters and/or prepare a call for papers in accordance with conference purpose and style 1.4 Draft conference program in line with stated purpose, and balance choice of program elements to allow outcomes to be

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ELEMENT	PERFORMANCE CRITERIA
	achieved 1.5 Select, invite and brief speakers in accordance with conference program 1.6 Identify participant target group and project numbers in consultation with conference organisers 1.7 Plan conference administration requirements and tasks, processes and resources to ensure efficient management of conference data and resources
2 Promote conference	2.1 Establish a promotion strategy that reaches required number of target participants 2.2 Prepare publicity material in accordance with promotion strategy and budget allocation/s, and despatch within designated timelines
3 Organise conference	3.1 Make conference arrangements in accordance with booking lead times and budget allocation/s 3.2 Record acceptances, receipt fees and confirm participants within designated timelines 3.3 Identify and cater for participants' specific needs 3.4 Confirm program details and prepare conference papers in accordance with speakers' requirements and conference timeline 3.5 Despatch pre-conference information to participants within designated timelines
4 Coordinate conference proceedings	4.1 Check conference facilities to confirm they meet agreed requirements 4.2 Register participants in accordance with planned registration procedures 4.3 Communicate to participants any late changes to published program 4.4 Make contingency arrangements to ensure smooth running of conference 4.5 Ensure speakers' schedules are managed and their conference requirements met throughout conference 4.6 Manage administration requirements during conference in accordance with conference plan/schedule
5 Follow up conference proceedings	5.1 Record, report and/or follow up conference outcomes in accordance with organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	5.2 Prepare conference papers for publication and distribution within designated timelines 5.3 Post-conference correspondence is prepared and despatched within designated timelines 5.4 Finalise receipts and payments, and acquit conference funds in accordance with organisational procedures and 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	Performance Criteria	Description
Reading	1.3, 1.4, 1.7, 2.2, 3.1-3.4, 4.2, 4.5, 4.6, 5.1-5.4	• Interprets information from complex texts, including organisational policies and procedures
Writing	1.3, 1.4, 1.7, 2.1, 2.2, 3.1, 3.2, 3.4, 4.2, 4.3, 5.1-5.4	• Addresses the context, purpose and audience when generating a range of texts • Utilises information from a range of sources to prepare complex texts in required formats ensuring accuracy of spelling, grammar and punctuation
Oral Communication	1.1, 1.2, 1.5, 1.6	• Participates in verbal exchanges using appropriate pitch, tone and fluency for audience, context and purpose • Listens closely and asks questions to confirm or clarify understanding
Numeracy	1.2, 1.7, 2.1, 2.2, 3.1, 3.2, 3.4, 3.5, 4.5, 4.6, 5.3, 5.4	• Interprets and comprehends a range of mathematical information that is embedded in texts • Performs calculations to estimate budgets, timeframes and resource requirements
Navigate the world of work	4.2, 5.1, 5.4	• Recognises and responds to both explicit and implicit organisational procedures and protocols
Interact with others	1.1, 1.2, 1.5, 1.6, 3.3, 3.5, 4.3, 5.2, 5.3	• 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, 1.5-1.7, 2.1, 2.2, 3.1-3.5, 4.1,	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps,

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	4.4-4.6, 5.3	reflecting an awareness of time constraints • Sequences and schedules activities, monitors implementation and manages relevant communication • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Anticipates potential problems and implements contingency plans as soon as warning signs are recognised

Unit Mapping

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM503 Plan and manage conferences	BSBADM503B Plan and manage conferences	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

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Assessment Requirements for BSBADM503 Plan and manage conferences

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:

- prepare and investigate conference requirements
- promote the conference using public relations strategies according to predetermined budgets and deadlines
- coordinate conference proceedings including addressing any problems as they arise
- fulfil all post-conference requirements according to 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:

- summarise relevant organisational policies and procedures for planning and managing conferences
- outline tools that could be used in managing conferences
- explain budgeting strategies used for projects
- identify techniques for conference planning including setting milestones.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- office equipment
- reference material related to conference venues, transport, accommodation and catering
- necessary conference documentation
- relevant contact persons, including speakers, clients and management.

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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

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BSBADM504 Plan and implement administrative 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 plan for or review the requirements of effective administrative systems and procedures for implementing, monitoring and reviewing the system.

It 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

Administration – General Administration

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 Plan for the new or modified administrative system	1.1 Identify requirements of, or modifications to, the administrative system through consultation with system users and other stakeholders in accordance with organisational and budgetary requirements 1.2 Obtain quotations from suppliers/developers for the identified requirements or modifications to be made to the system in accordance with organisational policy and procedures 1.3 Select supplier or developer in accordance with organisational

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ELEMENT	PERFORMANCE CRITERIA
	policy and procedures
2 Implement new or modified administrative system	2.1 Identify and develop implementation strategies in consultation with staff 2.2 Encourage staff to participate in all stages of the implementation process 2.3 Implement system in accordance with organisational and legislative requirements 2.4 Define and communicate procedures for using the system to staff 2.5 Provide training and support for staff on the use of the new or modified system 2.6 Deal with contingencies to ensure minimal impact on users
3 Monitor administrative system	3.1 Monitor system for usage, security and output in accordance with organisational requirements 3.2 Modify system to meet changing needs in accordance with organisational requirements 3.3 Clearly identify further modifications and notify users 3.4 Monitor staff training needs and train new staff on administrative 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
Learning	2.5, 3.4	• Actively reinforces own knowledge and skills by training or mentoring others
Reading	1.2, 1.3, 3.1	• Extracts, analyses and evaluates information from complex texts, including organisational policies and procedures
Writing	1.1, 2.1, 2.4, 3.2, 3.3	• Gathers and utilises information and ideas from a range of sources to create texts to meet organisational requirements • Creates instructional texts using grammatical structures and vocabulary appropriate to audience and

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		context
Oral Communication	1.1, 2.1, 2.2, 2.4, 2.5, 3.4	• Participates in verbal exchanges using appropriate style, tone and vocabulary for audience, context and purpose • Uses listening and questioning techniques to elicit key information and confirm understanding • Presents complex information adjusting presentation style and vocabulary to suit the audience
Numeracy	1.1, 1.2	• Recognises and interprets numerical information related to budgets
Navigate the world of work	1.1-1.3, 2.3, 2.4, 3.1	• Develops systems to meet organisational and legislative requirements
Interact with others	1.1, 1.2, 2.1, 2.2, 2.4	• 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
Get the work done	1.1-1.3, 2.1, 2.3, 2.4, 2.6, 3.2, 3.3	• 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 • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Anticipates potential problems and implements contingency plans as soon as warning signs are recognised • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADM504 Plan and implement administrative	BSBADM504B Plan or review administrative	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
systems	systems	Minor title change Minor correction to wording in elements and performance criteria - ‘administration‘ changed to ‘administrative’	

Links

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

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Assessment Requirements for BSBADM504 Plan and implement administrative 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:

- work with relevant personnel and stakeholders to identify administrative system improvements
- document necessary requirements or modifications
- provide training and support for staff to use the new or modified system
- monitor the new system and identify future improvements and staff training 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:

summarise relevant legislative and organisational policies and procedures for reviewing administrative systems

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- organisational policy and procedure manuals
- reference materials
- appropriate equipment.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBADM506 Manage business document design and development

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 standards for the design and production of organisational documents and to manage document design and production processes to ensure agreed standards are met.

It applies to individuals employed in a range of work environments who require well-developed skills in the use of a range of software packages. They use these skills to establish, document and implement consistent standards of document design within an organisation.

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

Unit Sector

Administration – General Administration

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 documentation standards	1.1 Identify organisational and legislative requirements for information entry, storage, output, and quality of document design and production 1.2 Evaluate organisation’s present and future information technology capability in terms of its impact on document design and production

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify types of documents used and required by organisation 1.4 Establish documentation standards and design tasks for organisational documents in accordance with information, budget and technology requirements
2 Manage template design and development	2.1 Ensure standard formats and templates suit the purpose, audience and information requirements of each document 2.2 Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout 2.3 Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation
3 Develop standard text for documents	3.1 Evaluate complex technical functions of software for their usefulness in automating aspects of standard document production 3.2 Match requirements of each document with software functions to allow efficient production of documents 3.3 Test macros to ensure they meet the requirements of each document in accordance with documentation standards
4 Develop and implement strategies to ensure the use of standard documentation	4.1 Prepare explanatory notes for the use of standard templates and macros using content, format and language style to suit existing and future users 4.2 Develop and implement training on the use of standard templates and macros and adjust the content and level of detail to suit user needs 4.3 Produce, circulate, name and store master files and print copies of templates and macros in accordance with organisational requirements
5 Develop and implement strategies for maintenance and continuous improvement of standard documentation	5.1 Monitor use of standard documentation templates and macros, and evaluate the quality of documents produced against documentation standards 5.2 Review documentation standards against the changing needs of the organisation, and plan and implement improvements in accordance with organisational procedures

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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	• Actively reinforces own knowledge and skills by training others
Reading	1.1-1.4, 2.1- 2.3, 3.1-3.3, 4.2, 4.3, 5.1, 5.2	• Evaluates information from complex texts, including organisational policies and procedures • Extracts and evaluates information from a range of support sources to extend understanding
Writing	1.4, 2.1, 2.3, 3.3, 4.1-4.3, 5.1, 5.2	• Selects text type, subject matter and language to suit a specific audience and purpose • Organises content to support the purposes and format of the product
Oral Communication	2.3, 4.3	• Participates in verbal exchanges to gain information • Uses listening and questioning techniques to clarify and confirm understanding • Presents complex technical information adjusting presentation style and vocabulary to suit audience
Numeracy	1.4	• Recognises and interprets numerical information related to budgets
Navigate the world of work	1.1, 1.4, 2.2, 4.3, 5.2	• Recognises and adheres to organisational and legislative requirements
Interact with others	2.3, 4.2, 4.3	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.2, 4.3, 5.1, 5.2	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Utilises a broad range of complex features within digital applications to improve productivity, optimising software functions for specific purposes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBADM506 Manage business document design and development	BSBADM506B Manage business document design and development	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

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Assessment Requirements for BSBADM506 Manage business document design and development

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 the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- establish documentation standards to meet organisational requirements
- design, test and amend document templates
- develop and implement documentation and training to support use of standard templates and macros
- monitor the implementation of standard documentation templates and macros and make improvements in line with 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:

- describe document production processes
- identify costs involved with the implementation of standard documentation
- explain the software applications relevant to document design and development in the organisation
- identify key provisions of relevant legislation and regulations, codes and standards affecting document production
- outline organisational policies and procedures relating to document production
- list sources of expertise available externally to the organisation or workgroup.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to:

- computer hardware and other document production equipment
- software applications appropriate to the task
- media for production of documents
- samples of high quality standard 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

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BSBADV402 Conduct pre-campaign testing

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, pilot and refine an advertising campaign to ensure marketing communication objectives are met.

It applies to individuals in an entry-level position in media planning, media buying, account management or advertising within an advertising team or media organisation.

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

Unit Sector

Business Development – Advertising

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 Plan pre-campaign testing	1.1 Apply valid and reliable measurement tools for testing aspects of the advertisement 1.2 Document expected outcomes and targets 1.3 Select test group and timing of pilot advertisement in accordance with advertising brief 1.4 Negotiate media placement in accordance with budgetary and scheduling requirements
2 Pilot advertisement	2.1 Test advertisement in accordance with time and financial

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ELEMENT	PERFORMANCE CRITERIA
	requirements of advertising brief and budgetary requirements 2.2 Conduct data collection in accordance with requirements of evaluation tool/s and advertising brief
3 Utilise pre-campaign test results	3.1 Analyse test results for impact on advertising campaign 3.2 Make changes to advertisement or media schedule, in response to pre-test information, which meets requirements of advertiser 3.3 Provide options for changes to advertisements and present to advertiser, if required 3.4 Amend advertisements, where necessary, so they meet legal and ethical requirements

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, 2.1, 2.2, 3.1, 3.2, 3.4	• Analyses and compares industry specific and complex text to determine and distinguish advertising requirements
Writing	1.2, 3.2-3.4	• Prepares specific information which conveys an understanding of outcomes and alternatives using terminology and format appropriate to audience and context • Edits texts and incorporates required amendments
Oral Communication	1.4, 3.3	• Participates in verbal exchanges of ideas, and elicits views and opinions of others by listening and questioning
Numeracy	1.2-1.4, 2.1, 3.2-3.4	• Interprets numerical information and applies basic mathematical calculations to timing and budgetary information
Navigate the world of work	1.4, 3.4	• Takes personal responsibility for adherence to organisational practice, and legal and ethical standards within own work context
Interact with others	3.3	• Uses a range of strategies to establish a connection with others to establish understanding of needs, and where necessary refer to appropriate areas for further

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		assistance
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2 3.2-3.4	• Plans, sequences and prioritises routine and some non-routine tasks within own workload for efficiency and effective outcomes • Uses analytical tools and processes to conduct tests and evaluate results to inform decisions and actions and meet client requirements • Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to collect, analyse and present data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV402 Conduct pre-campaign testing	BSBADV402B Conduct pre campaign testing	Updated to meet Standards for Training Packages Minor change to title	Equivalent unit

Links

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

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Assessment Requirements for BSBADV402 Conduct pre-campaign testing

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 steps required to test an advertising campaign including:
  - appropriate measurement tools
  - documenting outcomes and targets according to advertising brief
  - adhering to budgetary and financial requirements
- document and analyse pilot-test data
- make changes to data 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 principles of advertising relating to marketing mix
- describe organisational advertising objectives, and contents of advertising, creative and media briefs
- explain key provisions of relevant legislation, codes of practice and national standards for advertising industry
- describe types of media available for advertisements
- explain application of ethical principles in advertising
- describe techniques for evaluating advertising effectiveness.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

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- office equipment
- business technology
- advertising brief
- relevant legislation, codes of practice and national standards for advertising industry
- measurement tools – traditional and/or internet based
- organisational policies and procedures.

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

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BSBADV403 Monitor advertising production

Modification History

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

Application

This unit describes skills and knowledge required to oversee, monitor and report on pre-production, production and post-production work for advertisements.

It applies to individuals in an entry-level position in media planning, media buying, account or advertising management within an advertising team or media organisation, who monitor the advertising production process.

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

Unit Sector

Business Development – Advertising

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 Oversee pre-production work	1.1 Confirm printing, print production, electronic production specifications, schedule, budget, supplier/s and resource requirements for pre-production activities 1.2 Monitor pre-production activities against scheduling and budgetary requirements and report likely overruns for action and approval in accordance with organisational policies and procedures 1.3 Estimate affect of any delay in pre-production and make recommendations to re-schedule activities to meet pre-production

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ELEMENT	PERFORMANCE CRITERIA
	schedule in accordance with organisational policies and procedures
2 Oversee production processes	2.1 Confirm specifications, production schedule, budget, supplier/s and resource requirements 2.2 Monitor progress against production schedule and identify likely variations in accordance with organisational policies and procedures 2.3 Gain approvals from relevant persons for schedule variations to production budget allocations in accordance with organisational policies and procedures if required
3 Monitor post-production processes	3.1 Confirm specifications, schedule, budget, supplier/s and resource requirements for post-production activities 3.2 Monitor post-production activities against scheduling and budgetary requirements and report likely variations for action and approval in accordance with organisational policies and procedures
4 Produce monitoring reports	4.1 Produce monitoring reports which contain details of progress for pre-production, production and post-production activities 4.2 Produce monitoring reports which meet organisational requirements on language, format, content, and level of detail 4.3 Provide monitoring reports within required timeframe

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, 2.1-2.3, 3.1, 3.2	• Recognises and interprets industry specific textual information to determine and verify advertising requirements
Writing	1.1-1.3, 2.1, 2.3, 3.1, 3.2, 4.1, 4.2	• Uses organised and logical structure and detailed language appropriate to audience and environment to prepare work-related reports/recommendations and confirm requirements based on a wide range of production information
Oral	1.1, 1.3, 2.1, 2.3, 3.1	• Confirms production requirements with relevant personnel using specific and industry related

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Communication		terminology • Uses questioning and listening techniques to clarify and report requirements and expectations while conducting monitoring activities
Numeracy	1.2, 1.3, 2.3, 3.2, 4.3	• Interprets and analyses numerical information using mathematical calculations to estimate time needed against budgetary requirements •
Navigate the world of work	1.2, 1.3, 2.2, 2.3, 3.2 4.2	• Accepts responsibility for ownership of tasks and makes decisions on completion parameters • Takes personal responsibility for adherence to organisational policies and procedures in own work context
Interact with others	1.1, 1.2, 2.1, 2.3, 3.1	• Uses a range of strategies to establish a connection with others to understand needs and, where necessary, refer to appropriate areas for further assistance
Get the work done	1.1-1.3, 2.1, 2.2, 3.1, 3.2, 4.3	• Sequences and schedules complex activities and monitors implementation • Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes • Understands purposes, specific functions and key features of common digital systems and tools, and operates them effectively to complete routine tasks • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV403 Monitor advertising production	BSBADV403B Monitor advertising production	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

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Assessment Requirements for BSBADV403 Monitor advertising production

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:

- confirm specifications for production activities and monitor from pre-production through post-production
- produce reports on pre-production, production and post-production monitoring activities
- prepare recommendations to re-schedule activities in the event of production delays.

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 legal and ethical requirements of advertising industry
- explain principles of advertising related to marketing mix
- explain key provisions of relevant legislation, codes of practice and national standards affecting business operations
- describe ethical principles for advertising
- explain role/s of production personnel
- identify techniques and production processes for radio, television and cinema, print, and websites.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- workplace information systems
- business technology, office equipment

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- computer resources
- organisational policies and procedures
- relevant legislation and codes of practice
- pre-production and post-production schedules.

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

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BSBADV404 Schedule advertisements

Modification History

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

Application

This unit describes skills and knowledge required to prepare and cost media schedules, book advertising time and space, and lodge advertisements.

It applies to individuals in an entry-level position in media planning, media buying, account management or advertising within an advertising team or media organisation, who schedule advertisements.

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

Unit Sector

Business Development – Advertising

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 Confirm advertising and media requirements	1.1 Confirm availability of completed advertisement 1.2 Identify and confirm chosen media and media vehicle/s from the media plan 1.3 Confirm timing for public release of advertisement 1.4 Confirm budget allocation per-medium per-advertising period
2 Prepare and cost media schedule	2.1 Confirm that duration and timing of media schedule meet requirements of the media plan

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Ensure distribution of messages over duration of schedule meets requirements of the media plan 2.3 Ensure number, size/length and placement/timing of advertisements in media schedule is in accordance with the media plan 2.4 Negotiate costs with media vehicles, report any variations from budget in costs per-medium per-advertising period, and gain approvals to proceed 2.5 Negotiate and gain approvals for changes to schedule required by unforeseen problems with media vehicle/s from supervisors/account managers in accordance with organisational policies and procedures 2.6 Cost overall media schedule to meet budgetary requirements
3 Book advertising time/space and lodge advertisements	3.1 Follow booking procedures in accordance with organisational policy and practice using appropriate technology 3.2 Lodge advertisements to meet deadline requirements of media vehicle/s in accordance with organisational procedures 3.3 Suggest changes or improvements to organisational scheduling procedures to supervisors or managers

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, 3.2	• Recognises and interprets textual information to determine and confirm advertising, media and procedural requirements
Writing	1.1, 1.3, 1.4, 2.1, 2.3-2.5, 3.2, 3.3	• Uses clear, persuasive and specific language to document arguments to obtain approval for changes • Prepares detailed and factual information required to lodge advertisements, and confirm and report on variations
Oral Communication	1.1-1.4, 2.4, 2.5, 3.3	• Uses clear questioning and active listening to establish requirements and confirm understanding

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Numeracy	1.3, 1.4, 2.3, 2.4, 2.6	• Uses mathematical techniques to identify cost and schedule requirements within budgetary constraints
Navigate the world of work	2.4, 2.5, 3.1-3.3	• Takes responsibility for providing quality advertising scheduling services complying with organisational policies and procedures • Uses scheduling experiences to suggest adjustment or improvement to organisational procedures
Interact with others	2.4, 2.5, 3.3	• Selects and uses appropriate conventions and protocols when conferring with internal and external stakeholders on financial and scheduling matters • Applies negotiation skills to establish understanding and reach agreement
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.5 3.1-3.3	• Determines job sequence and works logically and systematically to undertake clearly defined tasks to deadlines • Recognises and takes responsibility for addressing unforseen problems in complex work contexts • Uses digital technologies and systems to locate information, and enter data accurately

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV404 Schedule advertisements	BSBADV404B Schedule advertisements	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

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Assessment Requirements for BSBADV404 Schedule advertisements

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 and confirm media and the chosen means to advertise in accordance with the media plan for an advertisement
- locate and analyse organisational policies and procedures relevant to media schedules
- use appropriate industry technology
- organise timing and distribution of advertisements and negotiate costs with media sellers for an advertisement.

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 industry products/services such as media types and media vehicles
- outline legal and ethical requirements for the advertising industry
- describe principle of advertising as it relates to marketing mix
- outline organisational policies and procedures for scheduling advertisements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- workplace information systems
- business technology and office equipment
- media plan
- organisational policies and procedures

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- organisational scheduling procedures.

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

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BSBADV405 Perform media calculations

Modification History

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

Application

This unit describes skills and knowledge required to calculate media costings, perform media ratings using mathematical techniques, and present findings.

It applies to individuals in an entry-level position in a media buying within an advertising team or media organisation, who conduct media calculations to provide quantitative analysis of the effectiveness of advertisements.

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

Unit Sector

Business Development – Advertising

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 Evaluate advertising media budget	1.1 Research and define media terminology 1.2 Categorise media costs 1.3 Calculate costings for selected media 1.4 Investigate and calculate agency service fees
2 Calculate electronic media rating points	2.1 Determine reach and effective reach for each advertising media 2.2 Determine and present identified qualitative and quantitative

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ELEMENT	PERFORMANCE CRITERIA
	attributes of media
3 Apply mathematical functions to advertising media tasks and problems	3.1 Calculate percentage shares and variations 3.2 Apply index numbers to a media situation 3.3 Perform calculations on simple index numbers 3.4 Calculate international currency conversions 3.5 Calculate the mean, average and weighted average of selected media data
4 Present media calculations	4.1 Use electronic spreadsheets to perform media calculations 4.2 Clearly present data on selected media

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	• Evaluates and compares textual information and data to determine options and costs
Writing	2.2, 4.2	• Develops material using clear and detailed language to convey explicit information and research results
Oral Communication	2.2, 4.2	• Presents results of findings choosing language appropriate to context and needs of audience
Numeracy	1.3, 1.4, 2.1, 2.2, 3.1-3.5, 4.1	• Collects and interprets a range of numerical data and applies mathematical calculations relating to media budgetary information
Get the work done	1.1, 1.2, 1.4, 2.1, 2.2 4.1, 4.2	• Determines job sequence and works logically and systematically to undertake clearly defined tasks for efficiency and effective outcomes • Uses digital technologies and systems to locate information, calculate, enter and present data.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBADV405 Perform media calculations	BSBADV405A Perform media calculations	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

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Assessment Requirements for BSBADV405 Perform media calculations

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:

- use mathematical techniques to calculate and present media costings and electronic media ratings to advertise a product or service
- use appropriate technology.

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 sources of media and comparative data
- explain media calculation principles and practices
- explain functions used in software packages to perform media calculations
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting advertising
- describe ethical principles that apply to advertising.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- advertising brief
- office equipment
- business technology
- industry software for complex calculations
- relevant legislation

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- media calculation research 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBADV406 Buy and monitor media

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 needed to confirm requirements specified in a media plan, conduct negotiations when buying media, and compare actual media performance against media plan objectives.

It applies to individuals in an entry-level position in media planning or buying within an advertising team or media organisation, who are responsible for planning, buying and evaluating media selected to convey advertising communication messages.

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

Unit Sector

Business Development – Advertising

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 Plan purchasing of media	1.1 Confirm requirements of advertising brief 1.2 Establish causal relationship between marketing communications and media objectives 1.3 Determine how creative strategy and execution will impact proposed media strategy 1.4 Identify how consumer insights relate to media consumption

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Compare and contrast scheduling alternatives
2 Buy media	2.1 Investigate and evaluate media market conditions 2.2 Conduct negotiations between suppliers for advertisement/commercial placements/spots 2.3 Obtain performance guarantees from media suppliers 2.4 Leverage placement value 2.5 Review proposed media plan against advertising objectives, schedules and budgets
3 Evaluate media performance	3.1 Investigate pre- and post-media performance/ratings and make any necessary changes to the media plan as required 3.2 Evaluate media costing data to determine effectiveness in relation to return on investment 3.3 Compare actual media performance against media plan objectives 3.4 Compare direct and indirect response rates 3.5 Determine problems/opportunities in the planning and buying process from differences between planned and actual accomplishments 3.6 Modify existing media strategies, or investigate alternatives based on media performance data

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, 1.5, 2.5, 3.1-3.4, 3.6	• Identifies, analyses and evaluates complex media information to determine requirements and outcomes
Writing	3.1, 3.6	• Edits texts and incorporates required amendments
Oral Communication	2.2, 2.3	• Interacts effectively with others using strategic communication and listening methods to obtain required outcomes

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Numeracy	2.5, 3.1-3.4	• Interprets and compares information based on performance ratings, costing data and response rates
Interact with others	2.2, 2.3	• Uses collaborative techniques to engage suppliers in consultation and negotiation
Get the work done	1.1-1.3, 1.5, 2.1, 2.3, 2.4, 3.1, 3.5, 3.6	• Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes • Uses formal and informal processes to evaluate media purchasing process and performance outcomes, to identify problems, alternative strategies and potential improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV406 Buy and monitor media	BSBADV406A Buy and monitor media	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

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Assessment Requirements for BSBADV406 Buy and monitor media

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:

- analyse and execute an advertising brief
- work with schedules
- negotiate with suppliers
- create and evaluate a media plan and adjust as necessary
- identify potential problems and opportunities
- evaluate data to determine cost effectiveness.

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 economic, social and industry trends
- list industry products/services
- outline organisational structure/s and roles and responsibilities
- identify and explain key provisions of relevant legislation, codes of practice and national standards that affect advertising
- outline ethical principles related to advertising.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- advertising brief and media plan

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- schedule
- media costing data
- relevant legislation and codes of practice
- office equipment
- business technology
- business software.

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

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BSBADV407 Apply media analysis and processing tools

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 compare and contrast characteristics of media analysis tools to choose the most appropriate software tool to perform media tasks and evaluate their outcomes.

It applies to individuals in an entry-level position in media planning or buying within an advertising team or media organisation, who use specialised media software in conducting their activities.

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

Unit Sector

Business Development – Advertising

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 Evaluate media software tool options	1.1 Compare and contrast characteristics and specific functions of media software tools when developing a media plan 1.2 Evaluate advantages and disadvantages of media software tools that could be used to perform media tasks 1.3 Contrast and evaluate functions of media software tools to perform media analysis and processing tasks 1.4 Generate media recommendations which meet advertiser’s

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ELEMENT	PERFORMANCE CRITERIA
	requirements
2 Use media software tools to perform media tasks	2.1 Use media software to segment target audience 2.2 Ensure program demographics match marketing objectives 2.3 Analyse radio and television survey data and logs to determine most appropriate media placements
3 Analyse campaign performance	3.1 Evaluate media performance results by channel, program and day of the week to determine performance against desired marketing objectives 3.2 Compare media performance against expected demographics by program and time slot 3.3 Present campaign performance results to advertiser

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, 3.2	• Recognises and interprets textual information to determine and compare media software functions and media performance against marketing objectives
Writing	1.4, 3.3	• Develops material using clear and detailed language to convey explicit information and campaign results
Oral Communication	3.3	• Uses clear and specific language suitable to audience to convey outcomes of performance analysis
Numeracy	2.2, 2.3, 3.1, 3.2	• Collects, organises and statistically analyses data using averages, percentiles, and measures of spread, and draws conclusions from trends
Interact with others	3.3	• Uses a range of strategies to establish a connection with others to establish an understanding of needs and communicate results
Get the work done	1.1-1.4, 2.1, 2.3, 3.1	• Systematically gathers and analyses all relevant information and evaluates options to make recommendations that meet advertisers requirements • Fully utilises features of digital tools and systems to organise, analyse, match and process information

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		• Uses analytical and evaluation processes to compare project objectives with performance outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV407 Apply media analysis and processing tools	BSBADV407A Apply media analysis and processing tools	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

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Assessment Requirements for BSBADV407 Apply media analysis and processing tools

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:

- evaluate and apply relevant media software options to perform media analysis tasks for advertising campaigns
- analyse, present and evaluate media performance results for an advertising campaign.

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 and explain data processing methods and analysis techniques
- list industry products/services
- identify organisational structure/s, roles and responsibilities
- outline and explain principles, advantages, disadvantages and applications of specific software to perform media tasks
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting advertising
- outline ethical principles relating to advertising.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- industry software for complex analysis
- relevant legislation and codes of practice
- organisational policies and procedures

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- appropriate survey data
- office equipment
- business technology.

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

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BSBADV408 Review advertising media options

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 recommend advertising media options suitable for a particular product or service. Individuals undertake research, review policy and procedure frameworks, and make final recommendations to relevant personnel.

It applies to individuals requiring a broad knowledge of advertising media, particularly people new to advertising. It is not assumed individuals at this level have responsibility for supervising the work of others. However, it is assumed their work supports effective work practices across the organisation.

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

Unit Sector

Business Development – Advertising

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 Research advertising media options	1.1 Clarify advertising media options for review, and record scope of review 1.2 Identify local, state or territory, national and international networks for advertising professionals 1.3 Identify other sources of information about advertising media options

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Select research strategy suitable to the topic 1.5 Consult with relevant personnel 1.6 Undertake research into a range of advertising media options for product or service 1.7 Critically analyse strengths and weaknesses of each option
2 Review policy and procedures frameworks	2.1 Locate and review policies and procedures relevant to advertising media options being researched 2.2 Review legislation, regulations, standards and ethical requirements that apply to advertising media options
3 Report research outcomes	3.1 Collate, analyse and record key findings of review as they relate to advertising 3.2 Compile report on research outcomes 3.3 Develop recommendations for advertising media options suitable for product or service 3.4 Present report in agreed format 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.

Reading	1.1-1.3, 1.6, 1.7, 2.1, 2.2	• Reviews range of information for research purposes and to inform recommendations about advertising media options
Writing	1.1, 3.1-3.3	• Produces clear and legible reports in required format documenting key findings
Oral Communication	1.5, 3.4	• Participates in verbal exchange of ideas and elicits views and opinions of others by listening and questioning
Navigate the world of work	1.2, 2.1, 2.2, 3.4	• Ensures legislative regulatory and ethical requirements, and relevant media policy and procedures is kept up-to-date to provide accurate information • Follows organisational requirements for presentation of information
Interact with others	1.5	• Uses a range of strategies to establish connections when communicating with relevant personnel to seek and share information

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Get the work done	1.3, 1.4, 1.6, 1.7, 2.1, 3.1, 3.3	• Plans, organises and implements tasks to achieve research and review objectives in consultation with others • Systematically gathers and analyses all relevant information and evaluates options to decide on appropriate research strategy • Uses critical and analytical thinking to assess media options, review related policy frameworks and develop recommendations • Uses familiar digital technologies and systems to locate, organise and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV408 Review advertising media options	BSBADV408A Review advertising media options	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

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Assessment Requirements for BSBADV408 Review advertising media options

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:

- produce a research report reviewing a range of advertising media options, including:
  - research methodology and information sources
  - descriptions of chosen advertising media options
  - strengths and weaknesses of each option
  - recommendation for use of selected advertising media options for a particular product or service
- compile a report on research outcomes and present to relevant personnel.

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 relevant legal and ethical requirements in media advertising industry
- identify and explain range of advertising media options
- identify and explain full range of research strategies and their suitability for different purposes
- locate and list advertising media networking communities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- industry software for report writing

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- relevant legislation and codes of practice
- organisational policies and procedures
- media option information data
- office equipment
- business technology.

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

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BSBADV503 Coordinate advertising research

Modification History

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

Application

This unit covers the skills and knowledge required to conduct primary and secondary advertising research to test advertising themes and ideas. It includes assessment of research requirements, selection of research methods, and use of findings.

It applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation.

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

Unit Sector

Business Development – Advertising

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 Assess advertising research requirements	1.1 Analyse information about consumer, product and market environment to identify and justify need for further research 1.2 Assess creative concepts to determine and justify need for concept testing 1.3 Assess media options and scheduling to determine and substantiate need for media research 1.4 Identify and assess legal, ethical and cultural considerations for

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ELEMENT	PERFORMANCE CRITERIA
	advertising research to determine their impact on research methods
2 Select research method/s	2.1 Confirm research budget and timeframe in selecting appropriate research method/s 2.2 Assess capacity of primary and secondary research methods to provide required information 2.3 Select pre-test advertising method/s most likely to provide required information on time and within budget 2.4 Prepare research brief specifying research objectives and method/s, budget, time, schedule and reporting requirements
3 Utilise advertising research findings	3.1 Analyse research results using appropriate techniques to identify findings and impact on advertising strategies, budgets and timelines 3.2 Adjust advertising strategies, budgets and timelines to reflect research findings 3.3 Revise advertising strategies to meet legal and ethical requirements, and requirements of advertiser

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, 2.1, 2.2, 3.1, 3.3	• Interprets range of complex information including legal and ethical requirements, primary and secondary research, and advertising brief
Writing	2.4, 3.2, 3.3	• Prepares specific and specialised information based on analysis and organises content to support the purpose and needs of advertiser, incorporating revisions as required
Numeracy	1.1, 2.1, 2.3, 3.1, 3.2	• Collects and interprets a range of numerical data and applies mathematical calculations relating to timelines and budgetary information
Navigate the world of work	1.4, 3.3	• Applies knowledge of codes of practice, cultural and ethical criteria to research methodology • Ensures advertising strategies meet legal and ethical requirements

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Get the work done	1.1-1.3, 2.2-2.4, 3.1-3.3	• Accepts responsibility for planning and sequencing relatively complex tasks and workload • Systematically analyses all relevant information and evaluates options to make informed decisions about advertising research requirements and methodologies suitable for product or service and within budget and time constraints • Performs analytical processes to establish findings, identify and makes necessary adjustments to advertising strategies, budget, and timelines • Uses familiar digital technologies and systems to locate, organise and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV503 Coordinate advertising research	BSBADV503B Coordinate advertising research	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

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Assessment Requirements for BSBADV503 Coordinate advertising research

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:

- assess need for media research and testing
- select and assess appropriate techniques to identify advertising research requirements for a product or service
- prepare research brief specifying objectives, methods, budget, time, schedule, reporting and human resource requirements for an advertising campaign
- locate and analyse legal and ethical 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 legal and ethical requirements affecting market research
- identify and explain organisational policy and procedures for conducting market research
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting business operations
- determine ethical principles relevant to advertising
- outline requirements for time, cost and scope as determined in advertising brief
- explain range of available market research and data analysis techniques
- identify statistical and research methods and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

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- relevant legal, cultural and ethical requirements
- organisational policies and procedures
- industry software for report writing
- office equipment
- business technology.

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

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BSBADV507 Develop a media plan

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 a media plan within a given budget, by defining requirements, selecting media vehicles and determining a schedule.

It applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation. It may also apply to someone working within a direct marketing role, who is responsible for planning media requirements for direct marketing campaigns or offers.

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

Unit Sector

Business Development – Advertising

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 Define media requirements	1.1 Identify target audience characteristics from advertising brief and prepare a detailed consumer profile which uses the same terms as those used to describe media audiences 1.2 Analyse product market factors to determine reach and frequency requirements of advertising media selected 1.3 Analyse creative requirements of advertising message and determine media implications

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify media merchandising requirements from the advertising brief 1.5 Confirm media budget and identify legal and voluntary constraints
2 Select media vehicles	2.1 Weigh up relative merits of identified media vehicle alternatives, taking past media performance into account 2.2 Evaluate and test new or alternative media vehicles with other advertisers and against proven vehicles 2.3 Select media vehicles that target the required audience, meet media requirements and fulfil merchandising requirements within budget 2.4 Select media vehicles that meet creative, reach and frequency requirements of the advertising message to be achieved within budget 2.5 Ensure selected media vehicles meet legal and ethical requirements
3 Determine media schedule	3.1 Ensure duration and timing of media schedule meet requirements of the advertising brief 3.2 Determine distribution of messages over duration of schedule to meet requirements of the advertising brief 3.3 Create a media schedule to satisfy advertiser 3.4 Develop alternative media schedules for advertiser within budget 3.5 Determine testing schedule for the media plan and continually modify media plan in accordance with results obtained
4 Produce media plan	4.1 Create media plan which defines media requirements of the advertising brief and provides evidence supporting each requirement 4.2 Specify recommended media and vehicle/s, and rationale for their selection in the media plan 4.3 Ensure media plan contains a budget allocation per medium per advertising period 4.4 Identify anticipated impact of advertising and measures to assess its effectiveness in the media plan

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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, 2.5, 3.1, 3.2	• Identifies, analyses and evaluates complex texts to determine requirements of advertising brief, and legislative, regulatory and business requirements
Writing	1.1, 3.1, 3.3-3.5, 4.1, 4.2	• Writes in a range of styles to suit job requirements and different audiences
Oral Communication	3.3	• Uses appropriate techniques, including active listening and questioning, to convey and clarify information
Numeracy	1.1, 1.5, 2.3, 4.3, 4.4	• Analyses and processes complex data to determine schedules and budget
Navigate the world of work	1.5, 2.5	• Takes full responsibility for following implicit and explicit voluntary constraints related to budget, legal and ethical requirements in selection of media vehicles
Get the work done	1.1-1.4, 2.1-2.4, 3.1-3.5, 4.1, 4.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Analyses relevant information to inform decisions about media requirements to conform to the brief • Utilises continuous improvement and testing strategies to ensure effectiveness of final media plan • Uses familiar digital technologies and systems to enter data, organise and present information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBADV507 Develop a media plan	BSBADV507B Develop a media plan	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBADV507 Develop a media plan

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:

- produce a media plan for an advertisement which:
  - defines media requirements of an advertising brief
  - specifies rationales for media vehicles chosen
  - ensures media schedule meets requirements of the brief
  - contains budgetary allocation for each advertising medium
- develop measures to assess effectiveness of media vehicles selected.

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 and explain data analysis and matching techniques
- list organisational products and services offered
- identify organisational budget and resource constraints
- identify principles and characteristics of advertising media, types of media and advertising strategies
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting business operations
- identify and explain ethical principles relating to advertising industry
- define terms for describing media audiences.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

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- relevant legislation and codes of practice
- organisational policies and procedures
- industry software
- office equipment
- business technology.

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

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BSBADV509 Create mass print media advertisements

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 create mass print media advertisements that communicate key features of a product, service or idea to consumers.

It applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation who are primarily responsible for development of mass print advertisements. Individuals undertaking this unit may develop mass print media advertisements themselves or coordinate a team to produce the advertisement.

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

Unit Sector

Business Development – Advertising

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 Interpret creative brief	1.1 Confirm central idea or creative concept, technique/s for expressing the idea/concept and mass print media to be used 1.2 Identify and check advertising content and supporting information for accuracy and completeness 1.3 Confirm time, schedule and budget requirements for creating the advertisement/s

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify legal and ethical constraints
2 Create mass print media advertisement	2.1 Determine and produce elements of a print advertisement to communicate required image, features and benefits of product or service 2.2 Size and position each element of print advertisement to achieve balance and focus for the advertisement 2.3 Ensure typeface selections suit the product and central idea of the advertisement, and layout balances white space and margins 2.4 Ensure layout of advertisement unifies elements, attracts the reader to the focal point and guides reading sequence 2.5 Ensure advertisement meets requirements of advertising brief and legal and ethical requirements

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, 2.5	• Interprets a range of textual information to ensure creative brief and legal and ethical requirements are met
Writing	1.1, 1.3, 2.1	• Records explicit information and develops effective messages for a variety of audiences and purposes
Oral Communication	1.1, 1.3	• Uses listening and questioning to elicit key information and clearly communicates requirements
Numeracy	1.3	• Interprets budgetary and scheduling information
Navigate the world of work	1.4, 2.5	• Takes full responsibility for adherence to legislative and ethical requirements
Interact with others	1.1, 1.3	• Uses collaborative techniques to engage clients in consultation and negotiation
Get the work done	1.1, 1.3, 2.1-2.5	• Works independently and collectively to make range of aesthetic and technical decisions meeting creative, legislative and ethical requirements • Understands purposes, specific functions and key

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		features of common digital systems and tools, and operates them effectively to produce print media

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV509 Create mass print media advertisements	BSBADV509A Create mass print media advertisements	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

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Assessment Requirements for BSBADV509 Create mass print media advertisements

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:

- create THREE print advertisements incorporating design principles and clearly communicating concept, for:
  - a newspaper
  - a magazine
  - an outdoor forum
- confirm accuracy of creative brief
- incorporate time, schedule and budget requirements
- ensure legal and ethical constraints 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:

- outline key features of industry, services, products and organisation
- explain principles and purposes of advertising
- outline principles of consumer behaviour and describe influences on buyer behaviour
- identify principles and elements of design used in print advertisements
- outline range of available advertising approaches for different markets
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting business operations
- identify ethical principles relevant to advertising industry
- identify requirements for advertising timelines, budget, central idea and resources as specified in the advertising brief.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- industry design software
- relevant legislation and codes of practice
- organisational policies and procedures
- office equipment
- business technology
- advertising copy and creative briefs.

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

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BSBADV510 Create mass electronic media advertisements

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 create advertisements that communicate key features of a product, service or idea to a consumer, using mass electronic media.

It applies to individuals working in a supervisory or management role in an advertising team or media organisation, who are primarily responsible for development of mass electronic advertisements. Individuals undertaking this unit may develop mass electronic media advertisements themselves or coordinate a team to produce the advertisement.

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

Unit Sector

Business Development – Advertising

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 Interpret creative brief	1.1 Confirm central idea or creative concept, technique/s for expressing the idea/concept and mass electronic media to be used 1.2 Identify and check advertising content and supporting information for accuracy and completeness 1.3 Confirm time, schedule and budget requirements for creating the advertisement/s

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify legal and ethical constraints
2 Create radio advertisement	2.1 Determine length, pace and format for radio advertisement in accordance with the creative brief and allocated budget 2.2 Determine content of opening, middle and close of radio advertisement to create impact, introduce central idea, provide support for key product benefits, and provide information to facilitate consumer action 2.3 Prepare scripts to meet requirements of producer and performer/s and the allotted time 2.4 Ensure radio advertisement meets requirements of the advertising brief and that it meets legal and ethical requirements
3 Create television or cinema advertisement	3.1 Determine length, pace and format for advertisement in accordance with the creative brief and allocated budget 3.2 Prepare scripts and storyboards to record visual plan and identify creative elements that meet requirements of the creative brief 3.3 Ensure advertisement attracts attention and sustains interest through coordination of action and motion visual effects, with audio to support visual image/s 3.4 Ensure advertisement meets requirements of the advertising brief and legal and ethical requirements
4 Create internet, web or podcast advertisement	4.1 Determine and produce copy and design elements to communicate required image, features and benefits of product or service 4.2 Size and position each element of advertisement to achieve balance and focus for the advertisement 4.3 Ensure typeface selections suit the product and central idea of the advertisement, and layout balances white space and margins 4.4 Design site map, navigation buttons, frames and multiple pages for ease of use 4.5 Ensure sound, animation and graphics do not distract from the content of the advertisement 4.6 Ensure advertisement meets requirements of the advertising brief and legal and ethical requirements

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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, 2.4, 3.4, 4.6	• Interprets range of textual information to ensure requirements are met • Evaluates information and products from a variety of sources to ensure appropriateness for client needs
Writing	1.1, 1.3, 2.2, 2.3	• Creates documents to ensure clarity of meaning, accuracy and consistency of information using specific and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.1, 1.3	• Uses listening and questioning to elicit key information and clear and direct language to confirm requirements
Numeracy	1.3, 2.1, 2.3, 3.1	• Extracts and evaluates meaning from data and interprets numerical information to apply within context of requirements
Navigate the world of work	1.4, 2.4, 3.4, 4.6	• Takes full responsibility for providing quality electronic media advertisements that comply with legislative and ethical requirements
Interact with others	1.1, 1.3	• Uses collaborative techniques to engage colleagues and external stakeholders in consultation and negotiation
Get the work done	1.1, 1.3, 2.1, 2.2, 3.1-3.4, 4.1-4.5	• Develops new and innovative ideas through exploration, analysis and critical thinking • Monitors progress of plans and schedules, and reviews and changes them to meet new demands and priorities • Meets budgetary, creative, legislative and ethical requirements • Uses 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
BSBADV510 Create	BSBADV510A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
mass electronic media advertisements	Create mass electronic media advertisements	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

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Assessment Requirements for BSBADV510 Create mass electronic media advertisements

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:

- produce at least THREE mass electronic advertisements in accordance with an advertising and creative brief, including for:
  - radio
  - television or cinema
  - web or podcast
- confirm accuracy of creative brief
- incorporate time, schedule and budget requirements
- ensure adherence to appropriate legal and ethical constraints.

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 features of industry, services, products and organisation
- explain principles and purposes of advertising
- outline and explain principles of consumer behaviour and influences on buyer behaviour
- identify principles and elements of design in electronic advertisements
- list a range of available advertising approaches for different markets
- identify and explain key provisions of relevant legislation, codes of practice and national standards affecting business operations
- explain key ethical principles relevant to the advertising industry
- identify requirements for advertising timelines, budget, central idea and resources as specified in the advertising brief.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- industry design software
- relevant legislation and codes of practice
- organisational policies and procedures
- office equipment
- business technology
- advertising copy and creative briefs.

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

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BSBADV602 Develop an advertising campaign

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 an advertising campaign in response to an advertising brief, including clarifying and defining campaign objectives, preparing the advertising budget, and scheduling.

It 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

Business Development – Advertising

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 Define campaign objectives	1.1 Clarify advertiser's purpose and objectives from the advertising brief and use these to set objectives for the advertising campaign 1.2 State campaign objectives in measurable terms and identify nature and extent of what advertising is to accomplish 1.3 Ensure campaign objectives are feasible, given constraints of time, budget, product and market factors 1.4 Ensure campaign objectives take into consideration factors

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ELEMENT	PERFORMANCE CRITERIA
	which may affect consumer responses 1.5 Ensure campaign objectives meet legal and ethical requirements
2 Prepare advertising budget	2.1 Assess and specify research resource requirements for the advertising campaign 2.2 Assess and specify resource requirements for range of media options, creative and production services 2.3 Justify resources allocated to each component of advertising campaign and ensure they are sufficient, in relative terms, to achieve campaign objectives 2.4 Ensure overall budget meets requirements of the advertising brief
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 and ensure selection meets legal and ethical requirements 3.4 Ensure time allowed in schedule to meet creative, media and production requirements is sufficient to achieve advertising objectives 3.5 Include milestones for monitoring progress and expenditure against budget, and for evaluating campaign effectiveness in the schedule

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, 1.5, 2.4, 3.1, 3.3	• Identifies, analyses and evaluates complex texts to determine requirements of the brief, and relevant legal and ethical requirements
Writing	1.1, 1.2, 1.4, 2.1, 2.2, 3.2, 3.4, 3.5	• Develops material for a specific audience using clear and detailed language to convey explicit information

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Oral Communication	1.1, 3.2	• Interacts effectively to question and clarify objectives with the advertiser using appropriate listening and questioning
Numeracy	1.2, 2.1-2.4, 3.4, 3.5	• Develops budget and schedules according to requirements of the advertising brief
Navigate the world of work	1.5. 3.3	• Ensures campaign objectives and service provider selection process meet legal and ethical requirements
Interact with others	3.2	• Uses collaborative techniques to engage external suppliers in consultation and negotiation
Get the work done	1.1,1.3, 1.4, 2.1-2.3, 3.2-3.5	• Accepts responsibility for analysis of campaign requirements and management of related tasks and workload • Uses systematic, analytical processes in relatively complex situations; setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses main features and functions of digital technologies and tools to complete work tasks efficiently and effectively

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV602 Develop an advertising campaign	BSBADV602B Develop an advertising campaign	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

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Assessment Requirements for BSBADV602 Develop an advertising campaign

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 advertising campaign which meets the advertiser's purpose and objectives as specified in the advertising brief, including:
  - specified timelines for task completion
  - resource requirements
  - budgetary allocations and justifications.

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 principles of effective advertising for different markets
- describe contents of advertising briefs
- define what is meant by industry, services, products and organisation
- outline and describe ethical requirements relevant to the advertising industry
- identify organisational products or services
- explain principles and purposes of advertising, consumer behaviour, and influences on buyer behaviour
- identify and give an overview of key provisions of relevant legislation, codes of practice and national standards affecting business operations.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- relevant legislation and codes of practice
- organisational policies and procedures
- office equipment
- business technology
- advertising copy and creative brief.

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

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BSBADV603 Manage advertising production

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 advertising production of electronic and print advertising. It includes planning and directing the advertising production process, evaluating and selecting suppliers, and evaluating the final production of the advertisement according to the creative brief.

This unit applies to individuals working in a senior advertising management, advertising production 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

Business Development – Advertising

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 Plan production process for advertisements	1.1 Confirm timing and budgetary requirements for creative and production work 1.2 Assess creative brief and identify factors that influence the production process 1.3 Investigate and determine production processes to suit the advertising brief, creative work and advertising medium 1.4 Determine specifications to suit both the advertisement and

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ELEMENT	PERFORMANCE CRITERIA
	production process 1.5 Schedule pre-production work to meet production and post-production requirements 1.6 Plan a production schedule to meet requirements of advertising brief and media plan
2 Evaluate and select suppliers	2.1 Identify suppliers for each element in production process 2.2 Assess suppliers in terms of their expertise and capacity to meet production, budget and schedule requirements 2.3 Base choice of suppliers on merit and value for money and their capacity to meet legal and ethical requirements 2.4 Brief and gain agreement from suppliers on production, schedule and process requirements
3 Direct advertising production process	3.1 Integrate management of all aspects of production process to meet requirements of the advertising brief and schedule 3.2 Involve creative specialists in production process to solve creative problems and to advise on creative changes to ensure resulting advertisement is consistent with objectives and positioning for the product or service 3.3 Ensure outputs from production process meet requirements of the production schedule, creative brief and media plan and meet legal and ethical requirements
4 Evaluate advertising production	4.1 Evaluate quality and cost-effectiveness of production processes and report against requirements of the creative brief 4.2 Ensure evaluation processes are valid and measure quality against standards established in the creative brief 4.3 Evaluate final advertisement in relation to requirements of the creative brief

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

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Reading	1.1-1.4, 2.2, 3.3, 4.1, 4.3	• Evaluates and compares textual information to determine requirements • Integrates information from a variety of sources to produce an effective advertisement according to the brief
Writing	1.1, 1.3, 1.6, 2,2, 2.4, 4.1, 4.3	• Develops material using clear and detailed language to clarify requirements of the advertising brief
Oral Communication	1.1, 2.4, 3.2	• Participates effectively in verbal exchanges using clear and detailed language
Numeracy	1.1, 2.3, 4.1, 4.2	• Collects and interprets numerical data relating to timelines and budgetary information • Evaluates cost-effectiveness of suppliers and production processes to meet requirements of advertising brief
Navigate the world of work	2.3, 3.3	• Ensures print and electronic production processes meet legislative and regulatory requirements
Interact with others	2.4, 3.2	• Plays a lead role in collaborating and consulting with a range of stakeholders to achieve shared understanding of individual roles in meeting objectives
Get the work done	1.1-1.6, 2.1-2.3, 3.1-3.3, 4.1-4.3	• Accepts responsibility for planning and sequencing complex tasks and workload • Systematically gathers and analyses all relevant information to make decisions about coordination, scheduling and management of all production processes • Selects reliable evaluation methods and processes to determine effectiveness of advertising production against requirements of the advertising brief • Uses familiar digital technologies and systems to access organise and present information and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV603 Manage advertising production	BSBADV603B Manage advertising production	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBADV603 Manage advertising production

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 production of at least TWO advertisements, including:
  - electronic
  - print
- plan production schedules in association with others
- select appropriate suppliers
- evaluate final advertisements.

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 organisational budget, product and/or services
- explain contents of advertising and creative briefs, and media plans
- describe printing, television, film and video production processes
- outline ethical requirements of the advertising industry
- identify and give an overview of key provisions of relevant legislation, codes of practice and national standards affecting business operations
- explain how to use software and operate equipment used in advertising production processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

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- relevant legislation and codes of practice
- organisational policies and procedures
- office equipment
- business technology
- advertising copy and creative brief.

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

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BSBADV604 Execute an advertising campaign

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 coordinate and monitor an advertising campaign, including developing an implementation strategy, negotiating media contracts and monitoring the campaign

It 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

Business Development – Advertising

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 Develop an implementation strategy	1.1 Analyse creative brief and media plan, and determine factors affecting implementation of campaign 1.2 Ensure strategy outlines implementation tasks and timelines, and includes a contingency plan for dealing with omissions and errors
2 Negotiate media contracts	2.1 Confirm media plan and budget for implementation with client 2.2 Negotiate advertisement positions and price with each media

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ELEMENT	PERFORMANCE CRITERIA
	vehicle in accordance with client's requirements 2.3 Negotiate and agree on contingency factors and solutions with media representative 2.4 Establish media contracts that meet legal and ethical requirements, and requirements of the advertising campaign brief and schedule
3 Monitor advertising campaign	3.1 Evaluate media performance against conditions of the contract, and identify and analyse any variations 3.2 Apply provisions of media guarantees and make adjustments to media schedules if necessary 3.3 Execute advertising campaign so it complies with the advertising schedule and budget and meets legal and ethical requirements

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, 3.1-3.3	• 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	1.1, 1.2, 2.1, 2.4, 3.1, 3.2	• Accurately records information according to organisational requirements • Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose
Oral Communication	2.1-2.3	• Participates effectively in spoken interactions using clear and detailed language
Numeracy	1.2, 2.2, 3.3	• Develops budget and schedules according to requirements of the advertising campaign
Navigate the world of work	2.4, 3.3	• Takes full responsibility for adherence to legal and ethical requirements in coordination and monitoring of advertising campaigns

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Interact with others	2.1-2.3	• Establishes and uses appropriate conventions and protocols when communicating with stakeholders to confirm campaign requirements • Uses collaborative techniques to negotiate necessary contractual arrangements and contingency plans
Get the work done	1.1, 1.2, 2.3, 3.1-3.3	• Sequences and schedules complex activities and tasks, and monitors implementation • Systematically gathers and analyses all relevant information to make decisions about campaign delivery and performance evaluation • Accepts responsibility for contingency management and negotiation to determine solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV604 Execute an advertising campaign	BSBADV604B Execute an advertising campaign	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

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Assessment Requirements for BSBADV604 Execute an advertising campaign

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 advertising campaign implementation strategy
- negotiate with media representatives to get price and positions for an advertising campaign
- evaluate media performance against contractual obligations for an advertising campaign.

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 and explain principles of media pricing policies, guarantees and campaign contingencies
- describe media vehicles and media options
- outline organisational budget, product and/or services
- explain principles of advertising, creative briefs and media plans
- describe print, television, film and video production processes
- explain ethical requirements of the advertising industry
- identify and give an overview of key provisions of relevant legislation, codes of practice and national standards affecting advertising.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- relevant legislation and codes of practice

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- organisational policies and procedures
- office equipment
- business technology
- media plans and creative brief.

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

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BSBADV605 Evaluate campaign effectiveness

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 a campaign evaluation strategy to determine whether advertising objectives have been achieved.

It 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

Business Development – Advertising

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 Develop a campaign evaluation strategy	1.1 Ensure evaluation strategy defines standards and measurements to assess effectiveness of advertising, and identify improvements 1.2 Establish a strategy which contains specific performance standards for each element of advertising campaign, as well as overall outcome 1.3 Ensure strategy includes evaluation of legal and ethical standards acceptable for advertisement/s 1.4 Include processes in strategy for correcting advertisement/s

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ELEMENT	PERFORMANCE CRITERIA
	that do not meet legal and ethical standards
2 Implement campaign evaluation strategy	2.1 Evaluate expenditure data to determine effectiveness of campaign in relation to the budget 2.2 Evaluate media program to determine performance against media plan objectives 2.3 Evaluate creative strategy in terms of copy content, creative execution and effectiveness of the finished advertisement 2.4 Evaluate interactive effect of all elements in the advertising campaign to determine overall effectiveness of the advertising campaign
3 Utilise advertising effectiveness data	3.1 Use results of evaluations of advertising effectiveness in analysis and planning phase for subsequent advertising 3.2 Use expenditure information to improve the budget planning process 3.3 Use feedback on the advertisement itself to provide ideas for future advertisements and to improve advertising copy 3.4 Use media performance information to determine whether alternative media approaches would yield better results 3.5 Use differences between planned and actual accomplishments to define problems to be addressed in next planning phase

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, 2.2-2.4, 3.3, 3.4	• Analyses and interprets a range of texts to evaluate effectiveness of the strategy
Writing	1.1-1.4, 2.2-2.4, 3.1, 3.5	• Develops material to convey explicit information evaluating advertising campaign
Numeracy	1.1, 1.2, 2.1, 3.1, 3.2, 3.4	• Interprets and compares numerical information to evaluate advertising effectiveness

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Navigate the world of work	1.3, 1.4	• Interprets relevant legal and ethical requirements and identifies and acts on issues that contravene them
Get the work done	1.2-1.4, 2.2-2.4, 3.3-3.5	• Accepts full responsibility for planning and development of evaluation strategies to assess effectiveness of campaigns • Selects and uses appropriate digital tools and measurement systems to perform complex analytical tasks • Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBADV605 Evaluate campaign effectiveness	BSBADV605B Evaluate campaign effectiveness	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

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Assessment Requirements for BSBADV605 Evaluate campaign effectiveness

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 implement an evaluation strategy for an advertising campaign, ensuring the campaign:
  - defines standards and measurements
  - adheres to legal and ethical standards
  - adheres to budget requirements
- analyse evaluation data to develop and document recommendations for improvement in future campaigns.

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 organisational budget planning process
- describe and explain techniques for evaluating advertising effectiveness and managing campaign contingencies
- identify key provisions of relevant legislation, codes of practice and national standards affecting advertising
- identify specifications in advertising, creative and media briefs.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – advertising field of work and include access to:

- relevant legislation and codes of practice

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- organisational policies and procedures
- office equipment
- business technology
- media brief.

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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• 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	• 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	• Recognises importance of building rapport to establish effective working relationships • Recognises importance of taking audience, purpose

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		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	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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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	• 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	• 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	• 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	• 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	• 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	• 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

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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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• Evaluates and integrates information from a variety of texts to construct purposeful meaning

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Writing	1.1-1.4, 2.3, 3.4, 4.1, 4.4	• 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	• 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	• 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	• 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	• 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

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Links

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

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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

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- 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

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

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

Foundation Skills

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

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Skill	**Performance Criteria**	**Description**
Reading	1.1, 1.3, 1.5, 2.2, 2.3, 4.2, 4.4, 5.2	• 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	• 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	• 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	• 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	• 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	• 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,

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		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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

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

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Reading	1.1, 1.3, 2.1, 2.2, 2.4, 3.1-3.4, 4.1-4.3, 5.1, 5.2	• 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	• 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	• 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	• 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	• 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	• 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

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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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• Uses objective language and positive tone to clearly articulate issues

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		• Uses active questioning and listening techniques to confirm understanding
Navigate the world of work	1.2-1.4	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• 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	• 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	• 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	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to

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done		longer term operational strategic goals • 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

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	• Gathers, interprets and analyses information to measure the success of conflict-resolution strategies
Writing	1.3, 2.3, 2.4, 3.3	• 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	• 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	• 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	• Uses analytical processes to decide on a course of action, establishing criteria for deciding between options and seeking input and advice from others

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		before taking action • 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

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Assessment Requirements for BSBATSIL503 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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

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	• 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	• Selects text type, subject matter and language to suit specific audience and purpose

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Oral Communication	1.1, 1.3, 2.3-2.5, 3.4, 4.1, 4.2, 4.5	• 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	• Uses mathematical formula to calculate remuneration against industry benchmarks
Navigate the world of work	1.1-1.3, 2.2, 3.1, 4.4	• 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	• 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	• 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

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Links

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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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,	• Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key

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	5.2, 5.3	information
Writing	1.2, 2.2, 2.3, 3.1-3.6, 4.1, 4.3, 5.1-5.3	• 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	• 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	• Interprets numerical information and applies basic mathematical calculations to manage available resources and evaluate performance
Navigate the world of work	3.1, 3.3	• 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	• 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	• 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

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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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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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	• 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	• 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	• 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	• 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	• 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,	• Develops flexible plans for complex, high-impact activities with strategic implications involving a

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done	7.2, 7.3	diverse range of stakeholders with potentially competing demands • 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information
Numeracy	2.3, 3.1	• 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	• 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	• 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

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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

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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:

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience
Oral Communication	1.1, 4.2, 4.3	• 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	• Interprets numerical information and applies mathematical calculations to develop and implement

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		an organisation’s annual budget
Interact with others	1.1, 4.2, 4.3	• 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	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

Foundation Skills

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

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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	• 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	• 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	• Uses appropriate techniques, including actively listening and questioning to convey and clarify information
Numeracy	4.2, 4.4, 4.6	• 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	• 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	• 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	• 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

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		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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

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	• 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	• Uses clear vocabulary, grammatical structures and conventions appropriate for target audience when completing and updating workplace documentation
Oral Communication	2.5	• 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	• Interprets numerical information and applies mathematical calculations to determine resources, KPIs and time requirements
Navigate the	1.3	• Monitors adherence to organisational policies and procedures and considers own role in terms of its

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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	• 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:	• 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

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Links

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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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,	• Utilises understanding of distinguishing structures and features of a range of textual information and reflects on context, purpose and audience

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	6.1-6.3	
Writing	4.2, 4.4, 5.3, 6.3	• Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience
Oral Communication	1.2, 2.1, 2.4	• 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	• 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	• 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	• 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	• 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

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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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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	Criteria	
Reading	2.2, 2.3, 5.2, 5.3, 6.1	• 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	• 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	• 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	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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

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	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	• 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	• 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	• 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	• 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	• 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	• 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	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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,

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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

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Reading	5.1	• 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	• 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	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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

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	• 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	• 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	• 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	• 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	• 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	• 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	• 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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Ensure changes to policies and procedures affecting employment are communicated to staff, and if applicable, to unions 2.4 Identify and access external industrial relations advice and representation as required 2.5 Ensure individual contracts for employees are developed and signed within relevant enterprise agreements or awards according to policies and procedures
3 Monitor and review staffing policies	3.1 Establish a review body for staffing policy 3.2 Monitor and assess outside industrial influences and impacts relevant to the organisation 3.3 Ensure regular occupational health and safety checks of workplace are undertaken according to policy and procedures 3.4 Review grievance procedures regularly 3.5 Ensure all aspects of employment policy and procedures are audited independently 3.6 Evaluate results of reviews and audits, and propose changes to policy and procedures if 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	1.1-1.3, 2.1, 2.2, 2.4, 2.5, 3.2-3.6	• 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	• 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	• 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	• Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and

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		developing organisational policies and procedures • 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,	• 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	• 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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• Integrates information from a number of sources and develops content that supports the purposes and format

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		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	• 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	• Monitors adherence to both implicit and explicit organisational policies and procedures
Numeracy	1.2, 3.1, 3.2, 4.4	• 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	• 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	• 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

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Links

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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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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	• 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	• 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	• Effectively participates in verbal exchanges using active listening and questioning to convey and clarify information
Numeracy	1.5, 3.1, 4.2	• 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	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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

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Reading	1.1, 1.2, 2.2, 2.3, 4.1, 4.2, 5.3, 6.1-6.4	• 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	• 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	• 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	• 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	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
	associated costs 2.4 Seek funds required for purchase of technology and associated costs
3 Ensure staff are prepared for new technology	3.1 Evaluate need for technology training 3.2 Identify suitable trainers and/or mentors to support staff to use the new technology 3.3 Ensure suitable training is provided for staff who will use new technology
4 Evaluate use of technology	4.1 Develop strategies to ensure new technology is used within the organisation 4.2 Evaluate whether technology is used effectively and meets organisational needs 4.3 Identify barriers to effective use of the technology 4.4 Develop and implement actions to address barriers to its effective use

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	• 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	• 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	• 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	• Interprets numerical information and makes calculations to determine cost-benefits and manage

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		resource allocations
Interact with others	1.3, 2.4, 3.2, 3.3	• 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	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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,	• Participates in culturally appropriate and respectful verbal exchanges with community members and key

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Communication	5.1-5.3, 6.2	stakeholders using clear language, suitable syntax and tone to address and disseminate relevant information • Uses active questioning and listening to elicit information and confirm understanding
Navigate the world of work	2.1, 4.3	• 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	• 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	• 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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• 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

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Numeracy	1.1-1.3, 2.4, 2.5	• Selects and interprets familiar mathematical information to evaluate statistical data, financial obligations and funding requirements
Navigate the world of work	2.4, 2.5	• 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	• 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	• 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

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Links

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

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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.

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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

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BSBAUD402 Participate in a quality audit

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 prepare for and participate in a quality audit as a member of a quality audit team. The types of audits may include external or internal systems audits or process or product/service audits.

The process includes reviewing designated documentation; identifying and developing checklists and audit related documentation; preparing audit schedules; gathering, analysing and evaluating information; and reporting findings to the lead auditor.

It applies to individuals with a broad knowledge of the quality auditing environment who analyse and evaluate information from a variety of sources to provide solutions to auditing issues, including unpredictable quality auditing problems.

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

Unit Sector

Regulation, Licensing and Risk – Quality Auditing

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 Review auditee documentation	1.1 Where applicable, review auditee's previous quality audits to establish possible impact on the conduct of the current audit 1.2 Request relevant organisational documents from auditee, and

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ELEMENT	PERFORMANCE CRITERIA
	review and check the adequacy of these documents 1.3 Amend reviewed documents, and determine and source any further documentation required 1.4 Resolve issues which arise with auditee and relevant parties
2 Participate in developing audit schedules	2.1 Access or prepare appropriate checklists/tools and audit related documentation 2.2 Confirm schedules and required resources with auditee before beginning auditing activities 2.3 Anticipate possible issues and outline strategies to address these issues, should they arise 2.4 Ensure preparation activities and documentation correspond to the audit plan 2.5 In consultation with auditing team, determine appropriate methods and techniques 2.6 Assist lead auditor in creating entry and exit meeting agendas
3 Gather and analyse information	3.1 Access a range of potential sources of information 3.2 Collect and make an initial assessment of sample documentation 3.3 Interview appropriate persons in relation to relevant documentation 3.4 Identify and report patterns, trends, interrelationships and areas of risk 3.5 Identify aspects of the audit that require the use of specialists and request appropriate assistance
4 Evaluate information	4.1 Evaluate information against prescribed benchmarks 4.2 Form a defensible opinion as to the meeting of these benchmarks by the auditee 4.3 Ensure opinions are formed from and supported by available information
5 Report findings	5.1 Formulate findings and prepare a corrective action report if discrepancies or non-compliances are detected 5.2 Examine results/findings against audit objectives and present to lead auditor 5.3 Report recommendations for improvements as applicable
6 Participate in exit	6.1 Prepare for exit meeting

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ELEMENT	PERFORMANCE CRITERIA
meeting	6.2 Ensure reporting arrangements are agreed upon and documented during the meeting 6.3 Ensure context and consequences of audit are explained, and follow-up is discussed

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, 2.6, 3.1-3.5, 4.1, 4.3, 5.1, 5.2	• Identifies and interprets information from organisational documentation and workplace procedures
Writing	1.2, 1.3, 2.1, 2.2, 2.4, 2.6, 3.2-3.5, 4.1, 4.3, 5.1-5.3, 6.2	• Records or amends information and conveys details in accordance with audit objectives
Oral Communication	1.2, 1.4, 2.2, 2.5, 2.6, 3.3, 3.5, 5.2, 5.3, 6.2, 6.3	• Participates in spoken exchanges using structure and language to suit the audience • Listens for required information and asks clarifying questions
Numeracy	2.5, 3.1, 3.2, 3.4, 4.1-4.3, 5.1, 5.2	• Uses a wide range of mathematical calculations to analyse and arrange numeric information
Navigate the world of work	1.1, 1.2	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.2, 1.4, 2.2, 2.5, 2.6, 3.3, 3.4, 3.5, 5.2, 5.3, 6.2, 6.3	• Collaborates and cooperates with others to achieve joint outcomes • Selects and uses appropriate conventions and protocols when communicating with team members and other people in a range of work contexts
Get the work done	1.1-1.4, 2.1, 2.3, 2.4, 3.1, 3.4, 4.1-4.3, 6.1	• Organises, plans and prioritises workload with some sense of what can be achieved in a timeframe • Systematically gathers, analyses and evaluates all relevant information to make decisions • Recognises and addresses some problems within own scope, recognising when to seek the expertise of others

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBAUD402 Participate in a quality audit	BSBAUD402B Participate in a quality audit	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

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Assessment Requirements for BSBAUD402 Participate in a quality audit

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:

- review and amend all relevant documentation
- develop an audit schedule using relevant tools and strategies
- use various methods to gather data and information to complete an audit, seeking specialist advice where appropriate
- use predetermined benchmarks to evaluate findings and formulate well-founded opinions
- develop a comprehensive report for the exit meeting, which analyses both context and consequences of the completed audit
- use terminology relating to quality auditing in written or oral communications.

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 relevant auditing codes of practice or ethics
- outline auditing methods and techniques
- summarise current audit practices
- identify current industry products and/or services to assist in the auditing process.

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 – quality auditing field of work and include access to:

- workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.

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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

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BSBAUD501 Initiate a quality audit

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 initiate and organise a quality audit with an auditee. It covers assessing the scope and objectives of a quality audit; communicating with the auditee regarding the proposed quality audit; identifying resources required to conduct the audit; and developing and submitting a quality audit plan. The types of audits may include external or internal systems audits or process or product/service audits.

It applies to individuals with a well-established theoretical knowledge base in quality auditing who are proficient in using a wide range of specialised, quality auditing and managerial techniques to plan, carry out and evaluate a quality audit. Individuals 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

Regulation, Licensing and Risk – Quality Auditing

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 Assess quality audit scope and objectives	1.1 Determine and discuss audit objectives with the auditee, client and all other relevant parties 1.2 Determine and discuss scope of the quality audit with the auditee, client and all other relevant parties

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify relevant standards that impact the environment in which the audit operates 1.4 Determine scope commensurate with identified risks
2 Communicate with auditee regarding proposed quality audit	2.1 Determine audit history, organisational structure and culture through consultation with the auditee 2.2 Negotiate and ensure agreement with auditee, the proposed audit methods and techniques to be applied 2.3 Outline audit processes to establish sequence of audit activities, and the roles of the auditors and auditees in the process
3 Identify resources required to conduct quality audit	3.1 Identify resources required to perform the quality audit efficiently and effectively 3.2 Select audit team members on the basis of relevant expertise 3.3 Confirm availability of resources required to conduct the audit with auditee 3.4 Assign roles and responsibilities to audit team members
4 Develop and submit quality audit plan	4.1 Develop quality audit plan according to established scope and objectives 4.2 Assign timing, schedules and responsibilities for implementation of the audit plan 4.3 Develop audit priorities and ensure agreement with auditees and audit team members 4.4 Document and submit audit plan to auditee
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 Review auditee’s previous audits to establish possible impact on the conduct of the current audit 6.2 Review and check relevant organisational documents for accuracy 6.3 Resolve arising problems with auditee and relevant parties
7 Identify and prepare checklists and audit	7.1 Develop checklists to reflect audit scope and objectives

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ELEMENT	PERFORMANCE CRITERIA
related documentation	7.2 Develop or obtain documentation required for the audit 7.3 Prepare agenda for entry meeting 7.4 Include value-adding activities in audit related documentation 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	Performance Criteria	Description
Reading	1.3, 4.1, 6.1, 6.2, 7.1	• Interprets and analyses information from organisational documentation
Writing	4.1-4.4, 6.2, 7.1-7.4	• Develops a range of documents using structure, tone and vocabulary appropriate to audience, context and purpose • Records or amends information and conveys details in accordance with audit objectives
Oral Communication	1.1, 1.2, 2.1-2.3, 4.3, 5.1-5.3, 6.3	• Participates in spoken exchanges using structure and language to suit the audience • Uses questioning and listening techniques to clarify requirements
Numeracy	4.2	• Uses mathematical calculations for project scheduling
Navigate the world of work	1.3	• Monitors adherence to organisational policies and relevant standards and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.1, 1.2, 2.1, 2.2, 3.4, 4.4, 5.1, 5.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Recognises the importance of building rapport and building effective working relationships • Collaborates with others to negotiate acceptable outcomes, playing an active role in facilitating effective group interaction
Get the work done	1.1, 1.2, 1.4, 2.1, 2.3, 3.1, 3.2, 4.1,	• Organises, plans and sequences own workload and schedules work activities of others • Uses analytical processes to decide on a course of

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	4.2, 4.3, 6.1, 6.3	action, establishing criteria for deciding between options and seeking advice from others before taking action when necessary • Addresses some unfamiliar problems of increasing complexity within own scope, recognising when to seek the expertise of others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBAUD501 Initiate a quality audit	BSBAUD501B Initiate a quality audit	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

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Assessment Requirements for BSBAUD501 Initiate a quality audit

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:

- produce documented audit plans for auditees across a variety of contexts including:
  - the scope and objectives of the audit
  - proposed audit methods and techniques to be used
  - required resources and schedules
  - allocation of individual audit team member responsibilities for conducting the proposed audit.
- use terminology relating to quality auditing in written or oral communications.

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 the relevant auditing codes of practice or ethics
- describe auditing methods and techniques
- outline the requirements of auditing regulations and standards
- identify current audit practices
- outline quality auditing principles, techniques and systems
- describe the requirements of house or other style manual protocols for written communications
- identify software applications relevant to quality auditing activities.

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 – quality auditing field of work and include access to:

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- workplace documentation including previous quality audit reports, checklists, risk management plans and audit 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

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BSBAUD503 Lead a quality audit

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 an audit team as it runs a quality audit. 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 types of quality audit that may be covered by this unit include an external or internal systems audit or process or product/service audit.

It applies to individuals with a well-established theoretical knowledge base of quality auditing, who are proficient in using a wide range of specialised quality auditing and managerial techniques to carry out their own work and to supervise the quality audit team. It is relevant to audits where a lead auditor is responsible for a quality audit team.

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

Unit Sector

Regulation, Licensing and Risk – Quality Auditing

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 Conduct entry meeting	1.1 Organise entry meeting in advance at a mutually agreed time 1.2 Prepare agenda for audit 1.3 Confirm objectives and scope of audit at entry meeting 1.4 Confirm schedules and logistical arrangements at entry

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ELEMENT	PERFORMANCE CRITERIA
	meeting 1.5 Make changes to plan, schedules and arrangements where required
2 Identify and gather information	2.1 Identify a range of potential sources of information 2.2 Interview appropriate persons 2.3 Gather relevant information and sample documentation
3 Manage audit team resources	3.1 Supervise activities of audit team members 3.2 Assess and review audit team findings in line with audit scope 3.3 Re-assign team members as required 3.4 Instigate contingency actions as required 3.5 Seek and reach agreement on corrective action reports
4 Conduct exit meeting	4.1 Make preparations for exit meeting 4.2 Examine results and findings against audit objectives and present to auditee 4.3 Ensure reporting arrangements are agreed on 4.4 Explain context and consequences of audit and discuss during follow-up
5 Guide team members in continuously improving their performance	5.1 Provide feedback on performance to audit team members 5.2 Encourage and support audit team members to critique their own work 5.3 Provide and document advice for individual 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	3.2, 4.2	• Interprets and analyses information from audit scoping materials
Writing	1.2, 1.5, 5.3	• Develops a range of documents using relevant structure, tone and vocabulary appropriate to audience,

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		context and purpose • Records or amends information and conveys details in accordance with audit objectives
Oral Communication	1.3, 1.4, 2.2, 3.5, 4.2-4.4, 5.1, 5.2, 5.3	• Participates in spoken exchanges using clear language, tone and pace • Uses questioning and listening techniques to clarify requirements
Numeracy	4.2	• Uses mathematical calculations to analyse and arrange numeric information
Interact with others	1.3, 1.4, 2.2, 3.1, 3.3, 4.2-4.4, 5.1, 5.2, 5.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • 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
Get the work done	1.1, 1.2, 1.4, 2.1, 2.3, 3.2, 3.3, 3.4, 4.1	• Organises, plans and sequences own workload and schedules work activities of others • Uses a combination of formal, logical planning processes and an increasingly intuitive understanding of context to identify relevant information and evaluate appropriate strategies to achieve objectives • Responds to problems requiring immediate attention, drawing on past experiences to devise solutions • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBAUD503 Lead a quality audit	BSBAUD503B Lead a quality audit	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBAUD503 Lead a quality audit

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 all objectives, schedules and relevant information prior to commencement of audit
- demonstrate leadership and management of a quality auditing team
- manage the information gathering process by team members, and analysis, synthesis and reporting of the findings
- encourage team members to continuously improve their performance through feedback and self-critique
- use terminology relating to quality auditing in written or oral communications.

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 quality auditing principles, methods and techniques
- outline the requirements of auditing regulations and standards
- identify current audit practices
- identify software applications relevant to conducting quality auditing activities.

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 – quality auditing field of work and include access to:

- workplace documentation including previous quality audit reports
- checklists
- risk management and audit plans.

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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

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BSBAUD504 Report on a quality audit

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 report on the outcomes of a quality audit and to take appropriate follow up action. It covers compiling audit results; preparing a report for the auditee/client; negotiating follow up action with the auditee/client; and monitoring and reviewing the auditing system and activities. The types of quality audit that may be covered by this unit include an external or internal systems audit or process or product/service audit.

It applies to individuals with a well-established theoretical knowledge base in quality auditing who are proficient in using a wide range of specialised quality auditing and managerial techniques to carry out their own work and to supervise the quality audit team. It addresses the function performed by either an auditor having sole responsibility for the audit or a lead auditor of a quality audit team.

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

Unit Sector

Regulation, Licensing and Risk – Quality Auditing

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 Compile audit results	1.1 Compare results of the audit evaluation against audit objectives and criteria plan

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Analyse audit results
2 Prepare report	2.1 Provide objective evidence relating to the need for reduction, elimination and prevention of non-conformance as the basis for the audit report 2.2 Produce audit report according to specified audit requirements 2.3 Present audit report to auditee and other stakeholders
3 Negotiate follow up process with auditee	3.1 Determine and initiate any corrective action required to deal with non-conformance, in consultation with auditee 3.2 Provide suggestions for improvements where applicable 3.3 Ensure timelines are agreed on for completion of corrective action activities 3.4 Ensure corrective action follow-up procedures are agreed with auditee
4 Monitor and review audit system and activities	4.1 Evaluate effectiveness and suitability in achieving audit objectives 4.2 Investigate possible improvements in audit methods, economy and efficiency

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, 4.1	• Interprets and analyses information from a complex range of organisational documentation
Writing	2.1, 2.2, 4.1	• Develops a variety of complex documents using relevant structure, tone and vocabulary appropriate to audience, context and purpose
Oral Communication	2.3, 3.1-3.4	• Participates in spoken exchanges using clear language, tone and pace • Uses questioning and listening techniques to clarify understanding
Numeracy	1.1, 1.2, 3.3, 4.2	• Collects, represents, summarises and interprets a range of statistical data

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		• Performs calculations required to measure output against timeframes
Navigate the world of work	2.2	• Monitors adherence to organisational policies and procedures • Considers own role in terms of its contribution to broader goals of the work environment
Interact with others	2.3, 3.1-3.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates with others to negotiate joint outcomes, playing an active role in facilitating team understanding
Get the work done	1.1, 1.2, 3.1, 4.1, 4.2	• Organises, plans and sequences own workload according to timelines and organisational requirements • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account • Analyses outcomes of decisions to identify opportunities for improvement • Recognises a range of familiar problems, their symptoms and causes, actively looking for suitable corrective actions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBAUD504 Report on a quality audit	BSBAUD504B Report on a quality audit	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

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Assessment Requirements for BSBAUD504 Report on a quality audit

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 audit results and produce a detailed audit report containing detailed analysis according to specified requirements
- negotiate follow-up actions with auditees/clients
- determine future improvements in auditing methods
- use terminology relating to quality auditing in written or oral communications.

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 quality auditing principles, methods and techniques
- outline the requirements of auditing regulations and standards
- identify current audit practices
- identify software applications relevant to conducting quality auditing activities.

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 – quality auditing field of work and include access to:

- workplace documentation including quality audit reports, checklists, risk management plans and audit plans.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBCMM101 Apply basic communication skills

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 basic communication skills in the workplace in particular gathering, conveying and receiving information together with completing assigned written information.

It 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

Communication – Interpersonal Communication

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 Identify workplace communication procedures	1.1 Identify organisational communication requirements and workplace procedures with assistance from appropriate people 1.2 Identify appropriate lines of communication with supervisors and colleagues 1.3 Seek advice on the communication method/equipment most appropriate for the task

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ELEMENT	PERFORMANCE CRITERIA
2 Communicate in the workplace	2.1 Use effective questioning, and active listening and speaking skills to gather and convey information 2.2 Use appropriate non-verbal behaviour at all times 2.3 Encourage, acknowledge and act upon constructive feedback
3 Draft written information	3.1 Identify relevant procedures and formats for written information 3.2 Draft and present assigned written information for approval, ensuring it is written clearly, concisely and within designated timeframes 3.3 Ensure written information meets required standards of style, format and detail 3.4 Seek assistance and/or feedback to aid communication skills development

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	• Reviews textual information to identify communication requirements and organisational procedures
Writing	3.2, 3.3	• Drafts simple texts using appropriate grammar, spelling and punctuation in accordance with organisational standards • Proofreads own texts for accuracy and compliance with organisational requirements
Oral Communication	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.2, 3.4	• Asks questions and listens to gain information or confirm understanding • Listens and follows instructions
Navigate the world of work	1.1, 1.2, 3.1, 3.3, 3.4	• Follows organisational policies and procedures and practices relevant to own role • Develops skills required to carry out own role by seeking and acting on feedback

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Interact with others	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.4	• Follows instructions regarding what and how to communicate • Seeks to cooperate with others to achieve results in immediate work context
Get the work done	1.3, 2.3, 3.1, 3.2, 3.3	• Follows clearly defined instructions, seeking assistance when necessary • Uses digital technologies following instructions to enter and retrieve data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCMM101 Apply basic communication skills	BSBCMM101A Apply basic communication skills	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

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Assessment Requirements for BSBCMM101 Apply basic communication skills

Modification History

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

Performance Evidence

Evidence of the ability to:

- gather information about procedures, methods and equipment requirements for workplace communication, with the assistance of others
- use appropriate verbal and non-verbal skills to seek and convey information in face-to-face situations
- draft routine written documents within designated timeframes and check that the documents meet 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 organisational policies, plans and procedures related to the organisation's standards or protocols for workplace communication
- describe different communication styles.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- office equipment
- business resources
- workplace policies and procedures relating to communication
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBCMM201 Communicate in the workplace

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 communicate in the workplace including gathering, conveying and receiving information and completing routine written correspondence.

It applies to individuals who perform a range of routine workplace communication tasks using a limited range of practical skills and fundamental knowledge of effective listening, questioning and non-verbal communication 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

Communication – Interpersonal Communication

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 Gather, convey and receive information and ideas	1.1 Collect information to achieve work responsibilities from appropriate sources 1.2 Use method/s and/or equipment to communicate appropriate ideas and information to the audience 1.3 Use effective listening and speaking skills in verbal communication

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Seek input from internal and external sources to develop and refine new ideas and approaches 1.5 Respond to instructions or enquiries promptly and in accordance with organisational requirements
2 Complete workplace documentation and correspondence	2.1 Present written information and ideas in clear and concise language to ensure the intended meaning of correspondence is understood by the recipient 2.2 Draft and present correspondence within designated time lines 2.3 Ensure presentation of written information meets organisational standards of style, format and accuracy 2.4 Complete workplace forms and documentation in a clear, concise and easy to read format
3 Communicate in a way that responds positively to individual differences	3.1 Value all individuals and treat them with respect, courtesy and sensitivity 3.2 Take into consideration cultural differences in all verbal and non-verbal communication 3.3 Use communication to develop and maintain positive relationships, mutual trust and confidence 3.4 Make efforts to use basic strategies to overcome language barriers 3.5 Ensure that behaviour is consistent with legislative requirements, enterprise guidelines and/or social protocols

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	1.4	• Seeks advice from others to implement strategies to improve knowledge or skills
Reading	1.1, 1.4, 1.5, 2.3, 2.4	• Reviews textual information to identify and interpret communication requirements and organisational standards
Writing	1.2, 1.5, 2.1, 2.2,	• Develops simple written texts using appropriate grammar, spelling and punctuation in accordance with

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	2.3, 2.4	organisational formats • Completes workplace forms and texts in accordance with organisational conventions and legislative requirements.
Oral Communication	1.1, 1.2, 1.3, 1.4, 1.5, 3.3, 3.4	• Explains ideas and requirements clearly and listens carefully to verbal instructions and discussions • Asks questions to confirm understanding
Navigate the world of work	1.5, 2.3, 3.5	• Understands responsibilities of role and complies with legislative, regulatory and organisational requirements
Interact with others	1.2, 1.4, 1.5, 3.1, 3.2, 3.3, 3.4	• Recognises common cultural and other differences of people in the work context and makes adjustments to accommodate the differences • Follows accepted communication practices and protocols to assist in building and maintaining positive working relationships
Get the work done	1.1, 1.2, 1.4,1.5, 2.1-2.4	• 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 basic information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCMM201 Communicate in the workplace	BSBCMM201A Communicate in the workplace	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

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Assessment Requirements for BSBCMM201 Communicate in the workplace

Modification History

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

Performance Evidence

Evidence of the ability to:

- communicate information and ideas verbally and non-verbally, taking cultural differences and language barriers into consideration
- produce written material, used routinely in day to day work, which is clear, concise and effectively convey the intended meaning to the recipient
- complete workplace forms
- use style, format and level of accuracy appropriate to the type of written material
- provide prompt responses to requests for information in accordance with 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:

- identify any organisational policies, plans and procedures which detail organisation's standards or protocols for workplace communication
- describe different communication styles
- outline barriers to communication.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- office equipment
- business resources

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- workplace policies and procedures relating to communication
- 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

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BSBCMM301 Process customer complaints

Modification History

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

Application

This unit describes skills and knowledge required to handle formal and informal negative feedback and complaints from customers.

It applies to individuals 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

Communication – Interpersonal Communication

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 Respond to complaints	1.1 Process customer complaints using effective communication according to organisational procedures established under organisational policies, legislation or codes of practice 1.2 Obtain, document and review reports relating to customer complaints 1.3 Make decisions about customer complaints, taking into account applicable legislation, organisational policies and codes 1.4 Negotiate resolution of the complaint and obtain agreement

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ELEMENT	PERFORMANCE CRITERIA
	where possible 1.5 Maintain a register of complaints/disputes 1.6 Inform customer of the outcome of the investigation
2 Refer complaints	2.1 Identify complaints that require referral to other personnel or external bodies 2.2 Make referrals to appropriate personnel for follow-up in accordance with individual level of responsibility 2.3 Forward all documents and investigation reports 2.4 Follow-up appropriate personnel to gain prompt decisions
3 Exercise judgement to resolve customer service issues	3.1 Identify implications of issues for customer and organisation 3.2 Analyse, explain and negotiate appropriate options for resolution with customer 3.3 Propose viable options in accordance with appropriate legislative requirements and enterprise policies 3.4 Ensure matters for which a solution cannot be negotiated are referred to appropriate personnel

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, 3.3	• Recognises, identifies and interprets textual information to determine legislative, regulatory and organisational requirements
Writing	1.2, 1.5, 1.6, 2.2, 3.3	• Documents complaints and actions taken in accordance with organisational requirements • Records spoken information clearly and accurately for future reference
Oral Communication	1.1, 1.4, 1.6, 2.2, 2.4, 3.2, 3.3, 3.4	• 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

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Navigate the world of work	1.1, 1.3, 2.1, 3.1, 3.3	• Takes personal responsibility for following organisational policies and procedures and legislative requirements
Interact with others	1.4, 2.2, 2.4, 3.2, 3.3, 3.4	• Follows organisational communication practices and procedures when referring complaints, seeking advice or negotiating outcomes
Get the work done	1.1, 1.2, 1.3, 1.4, 1.5, 2.2-2.4, 3.1	• Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes • Addresses less predictable problems applying problem solving processes in determining solutions that meet organisational requirements • 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**
BSBCMM301 Process customer complaints	BSBCMM301B Process customer complaints	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

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Assessment Requirements for BSBCMM301 Process customer complaints

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:

- process and document customer complaints according to organisational and legislative requirements
- use effective communication techniques to discuss options and resolve complaints
- follow correct procedures when referring and following up complaints.

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 the key provisions of relevant legislation from all forms of government that may affect aspects of business operations
- explain the communication skills required when handling customer complaints
- outline organisational procedures and standards for processing complaints
- list external bodies to which complaints could be referred.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- organisational policies and procedures relevant to customer complaints
- relevant legislation or codes of practice
- office equipment and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBCMM401 Make a presentation

Modification History

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

Application

This unit covers the skills and knowledge required to prepare, deliver and review a presentation to a target audience.

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

Communication – Interpersonal Communication

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 Prepare a presentation	1.1 Plan and document presentation approach and intended outcomes 1.2 Choose presentation strategies, format and delivery methods that match the characteristics of the target audience, location, resources and personnel needed 1.3 Select presentation aids, materials and techniques that suit the format and purpose of the presentation, and will enhance audience understanding of key concepts and central ideas

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Brief others involved in the presentation on their roles/responsibilities within the presentation 1.5 Select techniques to evaluate presentation effectiveness
2 Deliver a presentation	2.1 Explain and discuss desired outcomes of the presentation with the target audience 2.2 Use presentation aids, materials and examples to support target audience understanding of key concepts and central ideas 2.3 Monitor non-verbal and verbal communication of participants to promote attainment of presentation outcomes 2.4 Use persuasive communication techniques to secure audience interest 2.5 Provide opportunities for participants to seek clarification on central ideas and concepts, and adjust the presentation to meet participant needs and preferences 2.6 Summarise key concepts and ideas at strategic points to facilitate participant understanding
3 Review the presentation	3.1 Implement techniques to review the effectiveness of the presentation 3.2 Seek and discuss reactions to the presentation from participants or from key personnel involved in the presentation 3.3 Utilise feedback from the audience or from key personnel involved in the presentation to make changes to central ideas presented

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	• Reviews and analyses documents to identify information relevant to a specific presentation
Writing	1.1, 3.3	• Develops material to convey ideas and information to target audience in an engaging way
Oral	1.4, 2.1, 2.2, 2.3,	• Presents information using words and non-verbal features appropriate to the audience and context

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Communication	2.4, 2.5, 2.6, 3.2	• Uses listening and questioning techniques to gather information required to develop or modify presentations • Interprets audience reactions and changes words or non-verbal features accordingly
Interact with others	1.4, 2.1, 2.2, 2.4, 2.5, 2.6, 3.2	• Selects and uses appropriate conventions and protocols to encourage interaction or to present information • Demonstrates sophisticated control over oral, visual and written formats, drawing on a range of communication practices to achieve goals • Recognises the need to alter personal communication style in response to the needs or expectations of others
Get the work done	1.1-1.5, 2.2, 2.5, 3.1-3.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload to achieve outcomes • Uses feedback from others, analytical and lateral thinking to review current practices and develop new ideas • 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**
BSBCMM401 Make a presentation	BSBCMM401A Make a presentation	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

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Assessment Requirements for BSBCMM401 Make a presentation

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:

- prepare and deliver presentations related to occupation or area of interest which demonstrate the use of:
  - effective presentation strategies and communication principles
  - aids and materials to support the presentation
- select and implement methods to review the effectiveness of own presentation and document any changes which would improve future presentations.

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 collection methods that will support review and feedback of presentations
- identify regulatory and organisational obligations and requirements relevant to presentations
- describe the principles of effective communication
- describe the range of presentation aids and materials available to support presentations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- equipment, materials and business software packages for making a presentation
- business technology
- interaction with others.

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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

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BSBCMM402 Implement effective communication strategies

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 select and use communication strategies required to respond to an enquiry.

It applies to individuals who analyse information and then either respond personally or refer the enquiry to others.

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

Unit Sector

Communication – interpersonal communication

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 Receive enquiry	1.1 Establish nature of enquiry 1.2 Ensure interactions with person making enquiry are in accordance with organisation's standards and procedures and meet the person’s needs and expectations 1.3 Clearly outline legal and other limits of own responsibility to person making the enquiry 1.4 Record person's details and issues
2 Identify and apply	2.1 Use communication strategies that reflect organisational

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ELEMENT	PERFORMANCE CRITERIA
appropriate communication techniques	standards and procedures 2.2 Use effective communication techniques during the enquiry 2.3 Ensure confidentiality of the enquiry is respected
3 Determine action to be taken	3.1 Identify personal limitations in taking action and seek appropriate assistance from designated individuals 3.2 Respond in an appropriate manner 3.3 Involve other parties in action if appropriate 3.4 Manage expectations of person making enquiry
4 Review outcomes of communication	4.1 Follow up with person making enquiry to ensure action was effected 4.2 Seek feedback about the communication strategies 4.3 Undertake appropriate record keeping and reporting

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	• Interprets textual information from a range of sources to determine organisational standards and procedures
Writing	1.4, 2.1, 3.1, 3.2, 4.1, 4.3	• Accurately records information and completes documentation using required format, terminology and conventions • Prepares reports according to organisational requirements
Oral Communication	1.1, 1.2, 1.3, 2.1, 2.2, 3.1, 3.2, 3.3, 4.1, 4.2	• Uses listening and questioning techniques to gather information required to respond to queries • Presents information using words and non-verbal features appropriate to the audience and context
Navigate the world of work	1.2, 1.3, 2.1, 3.1	• Recognises and applies organisational policies and procedures and meets expectations associated with own work

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Interact with others	1.2, 2.1, 2.2, 3.1, 3.2, 3.3	• Uses appropriate communication practices showing awareness of the need to adjust personal communication style when handling enquiries of a sensitive nature
Get the work done	1.1, 1.4, 3.1, 3.3, 3.4, 4.1-4.3	• Plans a range of routine and non-routine tasks and implements actions in accordance with plan to meet desired outcomes • Uses problem solving skills to analyse enquiries and propose possible solutions, seeking input from others as required • Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCMM402 Implement effective communication strategies	BSBCMM402A Implement effective communication 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBCMM402 Implement effective communication strategies

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:

- receive enquiries according to organisational and legislative requirements
- select and use appropriate communication strategies and techniques for the particular needs of the person making the enquiry
- convey options available to address the enquiry and determine action to be taken according to organisation's policies and procedures
- confirm that the enquiry has been adequately addressed with the person making the enquiry
- document details of the enquiry and action taken according to organisational and legislative 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:

- identify organisation's standards and procedures which apply when responding to enquiries
- identify key legislative obligations and requirements which must be observed when responding to an enquiry.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- organisational policies and procedures relevant to customer service

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- relevant legislation or codes of practice
- office equipment and resources
- 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

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BSBCMM501 Develop and nurture relationships

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, nurture and maintain various networks and relationships with client, customers and colleagues in order to promote the organisation, to improve business practices and to find and secure new business relationships.

It applies to individuals who use communication and networking skills to develop and consolidate relationships with people in a range of sectors.

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

Unit Sector

Communication – interpersonal communication

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 Develop professional relationships	1.1 Conduct dealings with clients, professionals, and other third parties professionally and in accordance with the organisation's policies and procedures and legislative, regulatory and professional codes of practice 1.2 Comply with organisation’s social, business and ethical standards to develop and maintain positive relationships 1.3 Deal with colleagues, clients and other parties in a competent manner and with regard to confidentiality

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Adjust interpersonal styles and methods to the needs and situations of other parties
2 Build and maintain business networks and relationships	2.1 Develop and maintain business and professional networks and other relationships to benefit the organisation 2.2 Use business and professional networks to identify and cultivate relationships in order to promote and market the organisation 2.3 Collaborate with other professionals and third parties to expand and enhance the reputation of the organisation and to identify new and improved business practices
3 Nurture relationships and build on referral business for the long term	3.1 Follow up referral business through appropriate communication channels to find and secure new business relationships 3.2 Identify referral needs quickly and provide information about relevant products and services 3.3 Refer information and ideas about referral business to designated individuals with a view to nurturing ongoing business relationships

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, 3.1, 3.2	• Identifies, analyses and evaluates complex texts to determine, legislative, regulatory and organisational requirements • Analyses and evaluates information from a range of sources to support the development/maintenance of networks and relationships
Writing	3.1, 3.2, 3.3	• Develops materials that convey ideas and information to target audience in order to promote the organisation
Oral communication	1.1, 1.3, 1.4, 2.3, 3.1, 3.2, 3.3	• Presents information using words and non-verbal features appropriate to the audience and context • Uses listening and questioning techniques to gather information or confirm understanding

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Navigate the world of work	1.1-1.3	• Takes full responsibility for following policies, procedures, ethical standards and legislative requirements
Interact with others	1.1-1.4, 2.1-2.3, 3.1, 3.3	• Implements strategies to build rapport and nurture relationships with diverse individuals • Understands the importance of building formal and informal networks within and beyond immediate work context • Selects the appropriate form, channel and mode of communication to maximise building relationships
Get the work done	2.1-2.3, 3.1-3.3	• Develops and implements plans which aim to develop new relationships and maintaining existing relationships

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCMM501 Develop and nurture relationships	BSBCMM501A Develop and nurture relationships	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

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Assessment Requirements for BSBCMM501 Develop and nurture relationships

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 in accordance with organisational and legislative requirements
- use business and professional networks to benefit the organisation
- use available communication channels to identify new business relationships
- follow up on opportunities to build and develop ongoing business relationships.

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:

- briefly summarise the relevant legislation, regulations and codes of practice
- explain the relevance of an organisation's social, business or ethical standards to the development of professional relationships
- explain the interpersonal and communication skills needed to build and maintain business relationships
- list and describe communication channels that could be used to find and secure new business relationships
- identify sources of information about relevant associations, conferences and other relationship building opportunities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals using interpersonal communication skills in the workplace and include access to:

- organisational policies and procedures

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- organisation's social, business and ethical standards
- relevant legislation, regulations and professional codes of practice
- office equipment and resources
- 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

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BSBCNV501 Take instructions in relation to a transaction

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 take instructions from a potential client in order to initiate a real estate, business or personal conveyancing transaction.

It 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 Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 the client's needs	1.1 Identify, clarify and assess client needs and expectations in accordance with the practice's policy and procedures 1.2 Determine and discuss optional courses of action with client 1.3 Check information in relation to the transaction for accuracy and relevance 1.4 Obtain mutual agreement regarding responsibilities,

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ELEMENT	PERFORMANCE CRITERIA
	obligations and expectations of all parties to the transaction 1.5 Record and document client's needs and responsibilities promptly and accurately
2 Identify any conflict of interest	2.1 Identify and record existing or potential conflicts of interest associated with the transaction 2.2 Assess conflicts of interest to determine appropriate action for the client and practice, and promptly advise client of any necessary action
3 Identify parties, properties and other interests	3.1 Accurately identify and explain the roles of various parties involved in the conveyancing transaction 3.2 Analyse and explain estates and interests in the property of the relevant transaction 3.3 Analyse documentation and titles to confirm facts pertaining to the transaction 3.4 Communicate accurately to the client the title and contract details and respective consequences
4 Determine terms of engagement	4.1 Determine appropriate 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 authorities from client and other relevant parties 4.4 Check estimates of fees, disbursements and time for accuracy and completeness and provide to client
5 Determine contingency strategies	5.1 Assess 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 and complies with legislative requirements and with the policies and procedures of the practice 6.2 Advise client of all actions to be implemented to meet their agreed needs and expectations 6.3 Confirm and promptly record instructions from client to proceed or not to proceed 6.4 Make referrals to other professionals or third parties where appropriate

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ELEMENT	PERFORMANCE CRITERIA
	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	Performance Criteria	Description
Reading	1.1, 1.3, 2.1, 3.1-3.4, 4.4	• Accesses and interprets documentation from a variety of sources checking for accuracy, completeness and relevance
Writing	1.2, 1.4, 1.5, 2.1, 2.2, 4.1-4.4, 5.1, 5.2, 6.2, 6.3, 6.5	• Records information accurately using correct spelling, grammar and terminology in appropriate organisational formats • Prepares files and correspondence using logical structure and language appropriate for purpose and audience
Oral Communication	1.1, 1.2, 1.4, 2.2, 4.1-4.3, 5.1, 5.2, 6.2, 6.3	• Uses questioning and active listening to determine and confirm client requirements and to share information • Uses language and concepts appropriate to audience when participating in verbal interactions
Numeracy	1.3, 4.4	• Performs mathematical calculations to check accuracy and completeness of numerical and financial data with a focus on identifying errors and discrepancies • Effectively analyses, records and consolidates financial information
Navigate the world of work	1.1, 4.1, 6.1	• Takes full responsibility for ensuring that documentation and processes comply with legislative requirements and practice policies
Interact with others	1.1, 1.2, 1.4, 2.2, 4.1, 4.2, 5.1, 5.2, 6.2-6.4	• Selects and uses appropriate conventions and protocols to gain and provide information relevant to a conveyancing transaction
Get the work done	1.1, 1.2, 1.5, 2.1, 2.2, 3.1-3.4, 4.1-4.4, 5.1, 5.2, 6.1, 6.3, 6.5	• Plans, organises, implements and reviews actions needed to achieve objectives effectively and efficiently • Systematically gathers and analyses information and evaluates options to address complex or non-routine problems

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		• Anticipates potential problems and develops contingency plans • 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
BSBCNV501 Take instructions in relation to a transaction	FNSCNV501A Take instructions in relation to a transaction	Updated to meet Standards for Training Packages. Minor edits to clarify performance criteria in element 3. New PCs 3.3 and 3.4. Moved from Financial Services Training Package to Business Services Training Package.	Equivalent unit

Links

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

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Assessment Requirements for BSBCNV501 Take instructions in relation to a transaction

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 a client and identify their needs
- accurately interpret and document parties, properties and other interests and legal consequences
- determine terms of engagement and contingency strategies
- accurately record client details and requirements and initiate a transaction compliant with the practice's policy and procedures and relevant legislation.

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

Knowledge Evidence

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

- identify and explain key business principles and law applicable to take instructions for conveyancing, business and personal transactions
- explain current definitions of conflict of interest within legislation and the industry, with examples of conflict of interest situations in a conveyancing transaction
- identify and explain key current legislative, regulatory and industry practices, procedures and services
- identify and describe key policies, procedures and business requirements of the practice
- explain a range of professional and industry terminology
- identify and discuss relevant consumer protection compliance and any legal consequences
- identify and categorise relevant types of contract titles and other required documentation
- compare and contrast types of transactions for personal, business or real estate conveyancing.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable assessment records showing the establishment of a conveyancing client.

Assessor 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

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BSBCNV502 Read and interpret a legal document and provide advice

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 read and interpret a legal document and provide advice to a conveyancing client within a range of contexts and environments. It encompasses defining the nature and function of the document in the transaction and advising the client about their rights, obligations and alternative courses of action, if required.

It applies to individuals who apply specialised knowledge and pay close attention to detail when interpreting and analysing complex legal documentation and providing advice to others.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Define nature of document	1.1 Define the nature of the legal document 1.2 Identify the function and significance of the document in the conveyancing transaction
2 Identify relevant legal	2.1 Identify statutory and general law principles governing the

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ELEMENT	PERFORMANCE CRITERIA
principles	document and its function in the conveyancing transaction 2.2 Identify rules governing construction and interpretation of contracts and other legal documents 2.3 Identify rules for use of precedents, standard form contracts, and statutory forms 2.4 Conduct appropriate legal research, as required
3 Identify interests of client	3.1 Identify legal interests of the client in relation to the subject matter of the document 3.2 Identify terms essential to protect the client's interests 3.3 Identify non-legal interests and other needs of the client in relation to the subject matter of the document
4 Check document for accuracy	4.1 Check parties, property, information and factual details for accuracy and relevance 4.2 Check annexures to the document for accuracy and relevance 4.3 Check the document or an annexure for compliance if it is required to comply with a procedural or formal requirement 4.4 Check the document or annexure for compliance with statutory and practice requirements if it comprises a statutory or prescribed form 4.5 Identify information to be obtained from or provided to third parties or other professionals in relation to the document
5 Examine document	5.1 Closely examine the document and interpret and analyse relevant legal principles and key terms 5.2 Identify and assess rights, responsibilities and liabilities of all parties, expressed or implied in the document 5.3 Identify any lack of conformity with client's initial instructions and any gaps, lack of certainty or ambiguity in the language 5.4 Identify any non-compliance with legal principles within the document
6 Evaluate issues	6.1 Assess legal and non-legal issues and risks to the client arising from the document 6.2 Interpret extent to which the document does or does not protect the interests of the client 6.3 Interpret key terms or points for negotiation with third parties or other professionals

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ELEMENT	PERFORMANCE CRITERIA
7 Advise client	7.1 Summarise and clearly communicate rights, responsibilities and liabilities of all parties to the client, including specific rights of the client 7.2 Summarise and clearly communicate legal and non-legal issues and risks arising from the document to the client
8 Clarify instructions	8.1 Determine and discuss alternative courses of action with the client where it is considered the document does not adequately protect the interests of the client, or meet the client's other needs 8.2 Summarise and clearly communicate legal and non-legal consequences for each alternative to the client 8.3 Assist client in selecting a course of action
9 Attending to signing the document	9.1 Identify statutory and other rules governing signing and witnessing of documents, including deeds 9.2 Apply relevant rules governing signing and witnessing of documents in the execution of the document by the client
10 Document advice	10.1 Prepare a file note recording the substance and details of the advice given to the client and the instructions received 10.2 Despatch correspondence to client confirming the advice given in relation to the document and instructions received 10.3 If the document is not signed in the conveyancer's office, include, in correspondence dispatched to client, clear and concise instructions on signing and witnessing the document

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, 2.1-2.4, 3.1-3.3, 4.1-4.5, 5.1-5.4	• 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	7.1, 7.2, 8.1-8.3, 10.1-10.3	• Records and synthesises information accurately using correct writing mechanics and organisational formats

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		• Prepares files and correspondence using logical structure and language and concepts appropriate for purpose and audience
Oral Communication	7.1, 7.2, 8.1-8.3	• 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
Numeracy	4.1-4.5	• Effectively analyses, records and consolidates financial information and numerical data
Navigate the world of work	2.1-2.4, 4.3, 4.4, 9.1, 9.2	• Interprets and follows relevant legislative requirements explicit and implicit protocols, policies and procedures and meets expectations associated with own role • Ensures knowledge of legislation and regulations relevant to role is accurate, comprehensive and current
Interact with others	7.1, 7.2, 8.1-8.3	• Selects and uses appropriate conventions and protocols to gain and provide information of a legal nature • Uses collaborative techniques, language and concepts appropriate to audience when negotiating with and interviewing
Get the work done	3.1-3.3, 4.1-4.5, 5.2, 6.1-6.3, 8.1-8.3, 9.1, 9.2	• Plans, organises, and implements processes to complete required tasks efficiently and according to statutory and organisational requirements • Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions that could have legal consequences • Uses analytical thinking to anticipate potential problems and form contingency plans • 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**
BSBCNV502 Read and interpret a legal document and provide advice	FNSCNV502A Read and interpret a legal document and provide advice	Updated to meet Standards for Training Packages. Minor edits with some PCs combined in	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		elements 5, 6 and 7. Moved from Financial Services Training Package to Business Services Training Package.	

Links

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

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Assessment Requirements for BSBCNV502 Read and interpret a legal document and provide advice

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:

- review and interpret legal documents correctly and explain meanings and implications to clients
- compare legal requirements with client instructions
- prepare relevant, accurate and timely written and/or verbal advice to clients
- oversee a legal document signing
- maintain accurate and thorough 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:

- identify and explain key business principles and law applicable to reading and interpreting legal documents and transactions, including legislative and general law (common law and equity) principles
- identify and explain types of:
  - transactions for personal, business or real estate conveyancing
  - contracts and other documents used in conveyancing
- identify and explain key current legislative, regulatory and industry practices, procedures and services
- identify and describe key insurance requirements relevant to a conveyancing transaction
- explain, using simple vocabulary, a range of:
  - words, phrases and terms of conditions
  - professional and industry terminology
  - particular words or terms that could cause problems (e.g. shall/may/must/will)

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- identify and describe key policies, procedures and business requirements of the practice
- identify and apply relevant consumer protection compliance
- identify, describe and apply rules and procedures:
  - precedents and statutory forms
  - construction and interpretation of documents.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable assessment records showing the preparation of a variety of legal documents to support a conveyancing transaction.

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

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BSBCNV503 Analyse and interpret legal requirements for a transaction

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 analyse and interpret legal requirements 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, 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 Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Interpret legal principles and legislative requirements affecting conveyancing	1.1 Identify legal framework of conveyancing practice 1.2 Interpret components of statute law and their relationships with respect to their application to conveyancing practice

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ELEMENT	PERFORMANCE CRITERIA
transactions	1.3 Access legislation and regulations relevant to the provision of conveyancing services 1.4 Identify and analyse relevant case law for legal principles
2 Interpret legislative requirements affecting conveyancing transactions	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 rules and techniques for interpreting legislation and regulations in conveyancing transactions
3 Track and interpret changes to legislation and regulations affecting agency operations	3.1 Identify processes that lead to changes in legislation and regulations 3.2 Access source documents for amendment legislation relevant to the provision of conveyancing services 3.3 Establish a 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 appropriate people in line with agency policy and procedures
4 Comply with relevant codes of conduct	4.1 Source and access 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 Ensure personal 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 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.

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 2.1-2.3, 3.1-3.4, 4.1-4.3	• Accesses information and uses analytical skills to interpret complex documentation from a variety of sources
Writing	3.5, 5.2	• 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	3.6	• Effectively participates in verbal exchanges to convey and clarify information with range of personnel
Navigate the world of work	1.1-1.4, 3.1, 3.4, 3.5, 4.2-4.4, 5.1	• 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 • Ensures knowledge of legislation and regulations relevant to role is accurate, comprehensive and current
Interact with others	3.5, 5.1	• Selects and uses appropriate conventions and protocols to gain and provide relevant information on legal requirements
Get the work done	1.3, 2.2, 2.3, 3.1-3.5, 4.1, 5.1, 5.2	• Plans, schedules and implements processes and tasks to maintain currency of legislation, regulation and codes of practice for organisational use • Uses problem solving processes to identify, analyse and resolve issues that could have legal consequences • 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
BSBCNV503 Analyse and interpret legal requirements for a transaction	FNSCNV503A Analyse and interpret legal requirements for a transaction	Updated to meet Standards for Training Packages. Minor edits to clarify	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		performance criteria and address AQF level. PC 1.4 added. PC 3.5 deleted – repetitive. Moved from Financial Services Training Package to Business Services Training Package.	

Links

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

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Assessment Requirements for BSBCNV503 Analyse and interpret legal requirements for a transaction

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 comply with legislation and industry codes of conduct relating to conveyancing transactions and agency operations
- conduct legal research and apply changes in law to current practice
- communicate key information effectively to clients and other relevant professionals, and maintain accurate file 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:

- interpret and analyse legislation to identify legal principles, requirements and amendments affecting conveyancing transactions and agency operations
- interpret and explain key features of industry codes of conduct
- explain common problems associated with interpreting legislation
- identify and reference relevant/recent case law
- identify and explain key features of Commonwealth, and State or Territory legislation and local government regulations relating to:
  - contracts of sale of land
  - disclosure requirements
  - duties and taxes
  - government fees and registration requirements
  - insurance
  - relevant deposit legislation/requirements
  - estate agents' legislative requirements

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- competition and consumer protection
- privacy
- corporations and other legal entities

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Conveyancing field of work, and include access to:

- a range of common office equipment, technology, software and consumables
- suitable assessment records showing the preparation of a variety of legal documents to support a transaction.

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

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BSBCNV504 Prepare legal documents

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 prepare legal documents to support a conveyancing transaction on behalf of a client.

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 Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Determine legal nature and relevance of documents	1.1 Interpret the legal nature of the document 1.2 Determine the structure, function and significance of the document in the conveyancing transaction 1.3 Interpret and apply statutory and general law principles governing the document and its function in the conveyancing transaction
2 Prepare legal document	2.1 Identify and apply rules governing construction and

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ELEMENT	PERFORMANCE CRITERIA
	interpretation of contracts and other legal documents 2.2 Identify and apply rules for use of precedents, standard form contracts, and statutory forms 2.3 Use principles of legal drafting, including the use of plain language, to prepare the document
3 Review document against client's needs	3.1 Interpret and draft terms essential to protect the client's interests 3.2 Rectify any lack of conformity with the client's instructions
4 Check document for accuracy	4.1 Check parties, property information and factual details for accuracy 4.2 Check annexures to the document for accuracy and relevance 4.3 Correct gaps, lack of certainty or ambiguity in language 4.4 Review and rectify non-compliance with legal principles within the document

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, 3.1, 3.2, 4.1-4.4	• Analyses and evaluates complex documentation from a variety of sources checking for accuracy, completeness and relevance
Writing	2.1-2.3, 3.1-3.2, 4.3, 4.4	• Uses correct language and terminology to prepare comprehensive, clear and accurate legal documents
Oral Communication	3.2, 4.1, 4.3	• Uses questioning and active listening to effectively participate in verbal exchanges to convey and clarify information and resolve issues with range of personnel
Navigate the world of work	1.3, 2.1-2.3, 4.4	• Takes full responsibility for ensuring that all documentation and processes comply with legislative requirements and principles of legal drafting
Interact with others	3.2, 4.1, 4.3	• Selects and uses appropriate conventions and protocols to gain and provide relevant information on legal requirements

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Get the work done	1.2,1.3, 2.1-2.3, 3.1, 3.2, 4.4	• Plans, organises and implements tasks and workload for efficiency and in accordance with legal and organisational requirements • Uses problem solving processes to identify, analyse and address issues regarding legal documents • 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**
BSBCNV504 Prepare legal documents	FNSCNV504A Prepare legal documents	Updated to meet Standards for Training Packages. Minor edits to clarify performance criteria and address AQF level. PCs 1.2 and 1.4 combined. Moved from Financial Services Training Package to Business Services Training Package.	Equivalent unit

Links

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

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Assessment Requirements for BSBCNV504 Prepare legal documents

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:

- prepare legal documents that:
  - comply with legislative requirements
  - meet client needs
  - are accurate and checked for errors, inconsistencies and omissions.

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 explain key business principles and law applicable to drafting legal documents relevant to conveyancing transactions, including legislative and general law (common law and equity) requirements
- identify and discuss consumer protection compliance in drafting documents for conveyancing transactions
- discuss current definitions of conflict of interest within legislation and the industry
- identify and explain key current legislative, regulatory and industry practices, procedures and services
- define and explain a range of:
  - legal terms using simple vocabulary
  - key professional and industry terminology
  - words or terms relevant to drafting legal documents for conveyancing transactions
- explain the policies, procedures and business requirements of the practice
- explain key rules and procedures for:
  - use of precedents and statutory forms

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    - construction and interpretation of documents
- compare and contrast types of:
    - contracts and other legal documents relevant to conveyancing transactions
    - transactions for personal, business or real estate conveyancing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable assessment records showing the preparation of a variety of legal documents to support a transaction.

Assessors must comply with 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

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BSBCNV505 Finalise the conveyancing transaction

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 complete conveyancing transactions and ensure all matters including arranging settlement, determining contingency strategies, completing transactions and implementing post-transaction procedures, as appropriate, are completed.

It applies to individuals who use specialised knowledge, systematic approaches and strong organisational skills to prepare and process transactions efficiently.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Arrange the 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 accurately and completely including consideration of any relevant electronic requirements 1.3 Identify and collate information relevant to preparation of settlement statements and prepare and reconcile statements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify funds pertaining to the completion of the transaction and advise relevant parties 1.5 Receive funds required for the completion of the transaction within the required timeframe 1.6 Attend the settlement if required 1.7 Ensure documents are stamped correctly in accordance with legislative, regulatory and the practice's requirements
2 Determine contingency strategies for settlements where contractual obligations remain unfulfilled	2.1 Identify unfulfilled contractual obligations and assess possible contingencies 2.2 Identify a range of contingency strategies and options and evaluate and articulate these to the client 2.3 Determine appropriate strategies and options in consultation with client and in accordance with practice policy and procedures, and with legislative, regulatory and professional requirements
3 Complete transaction	3.1 Confirm transaction arrangements with all relevant parties and ensure conditions for the finalisation of the transaction, including compliance with special conditions are met 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
4 Implement post-transaction procedures, as appropriate	4.1 Advise all relevant parties, including rating and other authorities of transaction completion 4.2 Make outstanding payments 4.3 Monitor and conclude outstanding matters promptly 4.4 Confirm registration change on title, if applicable 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 and practice requirements

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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, 3.3	• Interprets and analyses a range of information relevant to key steps within a process
Writing	1.3, 1.4, 2.2, 2.3, 3.1, 4.1, 4.7, 4.8	• Prepares correspondence for a range of audiences and completes forms accurately using correct language, concepts and terminology
Oral Communication	1.4, 2.2, 2.3, 3.1, 4.1	• Participates effectively in verbal exchanges using questioning and active listening to determine and confirm requirements and instructions
Numeracy	1.4, 1.5, 3.1, 4.2, 4.6, 4.7	• Performs mathematical calculations to check accuracy and completeness of numerical and financial data • Gathers, interprets, analyses, consolidates and records financial information
Navigate the world of work	1.6, 2.3, 3.1, 4.9	• Takes full responsibility for ensuring that all documentation and processes comply with legislative and practice requirements
Interact with others	1.4, 1.6, 2.1-2.3, 3.1, 4.1, 4.3, 4.7	• Selects and uses appropriate conventions and protocols to gain and provide information for the conveyancing transaction • Collaborates with others to achieve required outcomes playing an active role in negotiating agreement
Get the work done	1.1-1.7, 3.1-3.5, 4.1-4.9	• Plans, organises, and implements tasks for effective and efficient outcomes, and in accordance with statutory and organisational requirements • Uses problem solving processes to identify and analyse conveyancing issues • Anticipates potential problems and implements contingency plans, if required • 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

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCNV505 Finalise the conveyancing transaction	FNSCNV505A Finalise the conveyancing transaction	Updated to meet Standards for Training Packages. Minor edits to clarify performance criteria. PC 1.6 added. Moved from Financial Services Training Package to Business Services Training Package.	Equivalent unit

Links

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

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Assessment Requirements for BSBCNV505 Finalise the conveyancing transaction

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:

- arrange and attend or electronically attend settlement in accordance with all instructions and requirements including:
  - adjustments of relevant outgoings and other fees
  - confirmation of final payments
  - checking documents for accuracy
- complete settlement transaction that meets:
  - agency or practice organisational policies and procedures
  - legislative requirements of settlement transactions
  - 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 as appropriate
- communicate effectively with a range of personnel.

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 the roles of relevant parties in a settlement
- describe file reconciliation procedures and other financial procedures relevant to settlement transactions
- describe the key features of:
  - formal and informal industry codes of practice governing settlement procedures
  - legislation, regulations and common law relevant to settlement transactions

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- outline practice, policy and procedures in relation to transaction settlement and client management
- explain monitoring procedures and possible solutions where actions are delayed, extended or rescheduled
- identify and describe key regulations and procedures of relevant government agencies relating to settlement transactions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable records showing the completion of a settlement transaction.

Assessors must comply with 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

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BSBCNV506 Establish and manage a trust account

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, manage and administer a trust or controlled money account in a conveyancing 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.

It 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 Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Review trust account for compliance with trust account requirements	1.1 Clearly identify, accurately record and continuously update practice trust account requirements in line with relevant legislation and regulations 1.2 Develop policies and procedures for accurate trust account-keeping which comply with trust account requirements, key principles of accounting and financial management, and

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ELEMENT	PERFORMANCE CRITERIA
	legislative requirements 1.3 Identify and apply criteria for evaluating electronic and manual trust accounting systems to ensure compliance with all trust account requirements
2 Establish and manage trust accounts	2.1 Identify and access source documents for trust transactions in line with legislative requirements 2.2 Produce documentation of trust records and transactions to give an accurate record of practice transactions on behalf of clients 2.3 Ensure transactions are supported by appropriate authorisation and documentation and are in line with practice and legislative requirements 2.4 Promptly and accurately record entries and transactions in line with relevant trust account requirements, and provide on demand as required 2.5 Promptly follow up discrepancies in entries or documentation to ensure clarification or resolution and report to relevant authorities where necessary 2.6 Check audit and security arrangements to ensure they provide adequate protection for client confidentiality and client funds held in trust
3 Manage and control trust accounts	3.1 Authorise and manage disbursements between trust and office accounts within agreed practice protocols and legislative requirements 3.2 Make appropriate arrangements with third parties and other professionals to ensure that practice trust accounts comply with legislative requirements 3.3 Disseminate or make readily available practice trust administration policies and procedures to relevant staff in line with practice and legislative requirements 3.4 Provide ongoing training for relevant practice staff to ensure efficient operation of trust accounts and financial and IT systems, and compliance with practice and legislative requirements 3.5 Develop and implement procedures for monitoring records and ensuring the security of trust account records
4 Monitor and review trust accounts	4.1 Regularly review documentation and other reporting requirements for compliance with legislative requirements 4.2 Regularly check and monitor trust account entries and transactions to ensure compliance with practice and legislative

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ELEMENT	PERFORMANCE CRITERIA
	requirements 4.3 Monitor trust account transactions to ensure appropriate authorisation is obtained prior to any disbursements
5 Authorise and verify trust accounts	5.1 Verify periodic reconciliation in compliance with legislative requirements 5.2 Prepare and discuss periodic financial reports with clients to ensure continued accuracy 5.3 Maintain records for convenience and proper 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	Performance Criteria	Description
Learning	3.4	• Actively updates and builds own knowledge and personal competence in order to provide training and mentoring to others
Reading	1.1, 1.3, 2.1, 4.1, 5.1	• 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	1.1, 1.2, 2.2, 2.4, 2.5, 3.2, 3.5, 5.2, 5.3	• Accurately records information and prepares documentation using clear and accurate language to convey and clarify explicit information and requirements
Oral Communication	2.5, 3.2, 5.2	• Participates in verbal exchanges using active listening and questioning techniques to clarify information and confirm understandings with a range of personnel
Numeracy	1.1, 1.3, 2.4, 2.5, 3.1, 4.2, 4.3, 5.1, 5.3	• 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
Navigate the world of work	1.1-1.3, 2.1, 2.3, 2.4, 3.1-3.5, 4.1, 5.1, 5.4	• Develops or modifies organisational policies and procedures that comply with legislative and practice

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		requirements • Takes full responsibility for compliance with legislative and organisational requirements • Maintains knowledge of legislative and practice requirements relevant to current role
Interact with others	2.5, 3.2-3.4, 4.3, 5.2	• Selects and uses appropriate conventions and protocols to gain and provide relevant information on the establishment and management of a trust account
Get the work done	1.1-1.3, 2.1-2.6, 3.1, 3.2, 3.3, 3.5, 4.2, 4.3, 5.1, 5.3, 5.4	• Plans, organises and implements processes to complete required tasks efficiently and in compliance with legislative and practice requirements • Systematically gathers and analyses all relevant information and evaluates options in order to address problems and make decisions about practice trust account management • Uses the main features and functions of digital tools to complete work tasks and to access information.

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.

Electronic or manual trust accounting system must take into account, the following factors:	• administrative systems • Australian Accounting Standards and codes of practice • bookkeeping • disclosure and reporting requirements • electronic funds management including transfer/deposit/verification • ethical requirements • electronic conveyancing – legislation, regulations and codes of practice • legislative and regulatory requirements • office routines • security requirements • trust account procedures.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCNV506 Establish and manage a trust account	FNSCNV506A Establish and manage a trust account	Updated to meet Standards for Training Packages Moved from Financial Services Training Package to Business Services Training Package.	Equivalent unit

Links

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

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Assessment Requirements for BSBCNV506 Establish and manage a trust account

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, administer and manage a trust and/or controlled money account in a conveyancing practice that:
  - complies with statutory and legislative requirements for the operation of trust accounts
  - uses standard accounting principles and financial management practices
  - follows practice or agency policies and procedures.

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 explain key:
  - accounting and bookkeeping techniques for financial control
  - auditing and reporting requirements relevant to trust account operations
- discuss issues relating to cost-benefit analysis of establishing/maintaining trust accounts
- outline key features of commonly used IT and management systems
- describe key features of policy and procedures of the practice relating to trust and office accounts
- identify and describe relevant financial, privacy, disclosure and business legislation and regulations relating to trust accounts
- identify and explain key security and ethical privacy procedures in relation to trust account operations
- identify and analyse key statutory standards on the operation, reporting and auditing requirements of a trust account
- analyse and describe key processes required to monitor financial performance evaluation

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- outline professional and ethical behaviour relevant to managing trust accounts
- outline legislative and professional requirements relating to client security, privacy and confidentiality.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable records showing the establishment and management of a practice trust account.

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

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BSBCNV601 Identify and conduct searches

Modification History

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

Application

This unit describes skills and knowledge required for conducting searches, analysing and evaluating all relevant conveyancing data for the transaction following confirmation of initial instructions from the client.

It 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 Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Conveyancing

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 Identify information needs	1.1 Identify sources of information relevant to the transaction 1.2 Examine documentation and titles to confirm facts relating to transactions 1.3 Define and confirm with client, searches to be performed prior to commencement 1.4 Identify and arrange required reports with the appropriate

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ELEMENT	PERFORMANCE CRITERIA
	bodies to meet agreed timelines 1.5 Identify applicable fees, taxes, other expenses and rebates, and promptly and accurately advise client
2 Perform relevant document searches and investigations	2.1 Accurately and thoroughly perform searches using appropriate methods 2.2 Establish and record legal positions in accordance with the practice's policy and procedures 2.3 Obtain required third-party reports from the appropriate bodies
3 Evaluate issues arising with transaction	3.1 Identify, summarise and communicate legal issues and risks to client clearly and promptly and in accordance with relevant legislation, regulations and the practice's policy and procedures 3.2 Define and clarify client's rights within the transaction for the client 3.3 Establish desired outcomes and devise strategies to achieve them in consultation with client 3.4 Thoroughly assess implications for professional indemnity insurance and take appropriate action
4 Deal with third parties and other professionals	4.1 Identify relevant third parties and other professionals 4.2 Identify information to be obtained from or provided to third parties and other professionals 4.3 Conduct appropriate consultation with third parties and other professionals and obtain authorities
5 Present information relevant to transaction to client	5.1 Present documentation clearly and promptly and in accordance with relevant legislation and regulations and the practice's policy and procedures 5.2 Record and document information necessary for the transaction to proceed in a legally binding manner in client files 5.3 Advise client of the implications of all information received from or forwarded to relevant parties

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 1.4, 1.5, 3.1, 4.2	• Actively gathers and collates documentation from a variety of sources • Analyses and reviews information for accuracy, completeness and relevance
Writing	1.3, 1.5, 2.2, 3.1-3.3, 4.3, 5.1-5.3	• Accurately and thoroughly records and maintains information • Prepares correspondence and documents clearly and concisely using correct language, concepts and terminology appropriate for purpose and audience
Oral Communication	1.3, 1.5, 3.1, 3.3, 4.3, 5.3	• Participates effectively in verbal exchanges, using questioning and active listening, to determine and confirm requirements and to obtain relevant information from a range of personnel
Numeracy	1.2, 1.5	• Effectively analyses, records and consolidates financial information and numerical data • Performs mathematical calculations to determine fees and taxes
Navigate the world of work	2.2, 3.1, 5.1	• Recognises and responds to relevant legislative requirements, explicit and implicit protocols, policies and procedures and meets expectations associated with own role
Interact with others	1.3, 1.5, 2.3, 3.3, 4.3, 5.3	• Selects and uses appropriate conventions and protocols when communicating with others to achieve specific outcomes
Get the work done	1.3, 1.4, 2.1-2.3, 3.1-3.4, 4.1-4.3, 5.1, 5.2	• Takes responsibility for developing and implementing organisational processes that comply with legislative requirements and achieve required outcomes • Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions • Uses digital technologies to access, extract and share relevant information to achieve required outcomes

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCNV601 Identify	FNSCNV601A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
and conduct searches	Identify and conduct searches	Standards for Training Packages. Moved from Financial Services Training Package to Business Services Training Package.	

Links

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

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Assessment Requirements for BSBCNV601 Identify and conduct searches

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 a client and third parties involved in a transaction
- accurately request and record search information from authorities and third parties
- assess transaction risk and recommend strategies determined from information in compliance with practice or agency policy and procedures and relevant legislation relating to information searches
- present clear, concise and accurate information in relation to a transaction.

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 explain key:
  - business principles and law applicable to conveyancing transactions
  - current legislative, regulatory and industry practices, procedures and services
- analyse and explain the consequences of searches relevant to the conveyancing transaction
- identify and describe current procedures and practices for conducting searches
- identify any requirements of financial institutions
- identify and explain key insurance requirements relevant to the conduct of conveyancing searches
- outline policies, procedures and business requirements of the practice relevant to the conduct of conveyancing searches
- define and explain a range of professional and industry terminology
- outline key registration and conversion procedures and strategies
- discuss issues relating to risk assessment and evaluation strategies

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- compare and contrast types of document searches, including e-conveyancing systems, for personal, business or real estate conveyancing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the conveyancing field of work and include access to:

- common office equipment, technology, software and consumables
- suitable records showing the conduct of conveyancing search.

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

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BSBCOM401 Organise and monitor the operation of compliance management 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 performance outcomes, skills and knowledge required to organise and monitor the operation of a compliance program/management system established by an organisation. It has been designed to be consistent with AS 3806:2006 Compliance programs.

It applies to individuals who create solutions to a range of unpredictable problems and provide leadership and guidance to others with some limited responsibility for the output of others. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Identify compliance roles and responsibilities	1.1 Confirm and interpret the compliance requirements applicable to the organisation 1.2 Examine the structure of the organisation to determine the roles, accountabilities and responsibilities of managers and operational staff in maintaining compliance within the

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ELEMENT	PERFORMANCE CRITERIA
	organisation's planned compliance program/management system
2 Organise the operation of the compliance program/management system	2.1 Confirm the components of the planned compliance program/management system and clarify the proposed structures, procedures and budgetary arrangements for their implementation 2.2 Develop an implementation strategy and schedule for the establishment of the planned compliance program/management system in accordance with relevant Australian and international standards 2.3 Assign or acquire resources for the planned compliance program/management system in accordance with organisational procedures and policies 2.4 Arrange appropriate briefings and training to ensure relevant managers and operations staff are aware of their roles and responsibilities 2.5 Launch the compliance program/management system in accordance with organisation's plan
3 Monitor the operation of the compliance program/management system	3.1 Gather information on the operation of the compliance program/management system from appropriate sources 3.2 Review feedback and performance indicators on the operation of the compliance program/management system in terms of agreed criteria 3.3 Identify problems in the operation of the compliance program/management system and in particular any breach of compliance requirements and take appropriate action to address problems 3.4 Provide detailed compliance requirements in the case of breaches, initiate specific timely action and inform all relevant internal and external personnel through the established reporting systems
4 Document the operation and monitoring of the compliance program/management system	4.1 Prepare and disseminate information on the operation of the compliance program/management system to relevant internal and external personnel in accordance with the communication strategy for the compliance program/management system 4.2 Prepare and disseminate periodic reports on the operation of the compliance program/management system, identify any operational problems and take any related action to relevant internal and external personnel 4.3 Prepare and disseminate reports on any identified breaches of compliance requirements and take any related action to relevant

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ELEMENT	PERFORMANCE CRITERIA
	internal and external personnel

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, 3.1, 3.2	• Identifies and evaluates complex texts in a variety of forms to determine key information, specific requirements and responsibilities
Writing	2.2, 2.4, 2.5, 3.4, 4.1-4.3	• Develops materials for specific audiences using correct and enterprise specific language • Prepares information in a designated format and style to convey information, requirements and recommendations
Oral Communication	1.1, 2.1, 2.4, 3.1	• Discusses or explains compliance requirements using structure and language to suit the audience • Uses listening and questioning techniques to confirm understanding of compliance requirements
Numeracy	2.1, 2.3	• Interprets numerical information and applies mathematical calculations relating to budgetary information, evaluating different scenarios
Navigate the world of work	1.1, 1.2, 2.2-2.4, 3.2, 3.3, 4.1-4.3	• Takes responsibility for developing, implementing and reviewing strategies to achieve compliance goals in accordance with legislative requirements
Interact with others	3.1, 3.4, 4.1	• Identifies and uses appropriate conventions and practices when communicating with internal and external personnel • Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Getting the work done	2.1-2.5, 3.1, 3.2, 3.3, 3.4, 4.2, 4.3	• Takes responsibility for planning, implementing and reviewing tasks required to achieve efficient and effective outcomes • Uses formal analytical thinking techniques to clearly identify problems and generate timely solutions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCOM401 Organise and monitor the operation of compliance management system	BSBCOM401B Organise and monitor the operation of compliance management 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

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Assessment Requirements for BSBCOM401 Organise and monitor the operation of compliance management 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:

- analyse sources of information to identify compliance requirements and staff who will be responsible for maintaining compliance within the planned compliance program/management system
- develop a schedule to implement, monitor and review the organisation's compliance program/management system, in collaboration with relevant personnel
- identify breaches of compliance requirements and provide timely solutions
- prepare and distribute reports on the operation of the compliance program/management system and any breaches of compliance
- communicate compliance information to a range of personnel.

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 relevant legislation, codes of practice, and Australian and international standards
- outline roles and responsibilities, systems, procedures and processes associated with the compliance program/management system including:
  - documentation of compliance requirements relevant to the organisation
  - compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management
  - procedures for liaising with internal and external personnel on compliance related matters

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- breach management policies and processes including identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements
- compliance reporting procedures
- corporate induction and training processes related to compliance management
- processes for the internal and external distribution and promotion of information compliance complaints handling systems
- continuous improvement processes for compliance including monitoring, evaluation and review
- strategies for developing a positive compliance culture within the organisation
- techniques and performance indicators for monitoring the operation of a compliance program/management system.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- standards, legislation, regulations and codes of conduct relevant to job role, occupation or profession
- organisation policies and procedures relevant to job role, occupation or profession
- compliance program or management system
- computer resources and business technology
- workplace documents
- 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

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BSBCOM402 Implement processes for the management of a breach in compliance requirements

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, classify, investigate, rectify and report breaches in compliance requirements within an organisation. The unit has been designed to be consistent with AS 3806: 2006 Compliance programs.

It applies to individuals who use the processes and procedures defined within an organisation's compliance program/management system to manage compliance breaches according to specific legislative requirements, code/s of practice and internal standards.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Identify a breach in compliance requirements	1.1 Monitor fulfilment of compliance requirements in operations within areas of responsibility in accordance with the organisation's established compliance program/management system 1.2 Promptly identify, classify, and report any breaches of compliance requirements
2 Develop and implement an action plan for investigation and rectification of a breach	2.1 Investigate identified breach of compliance requirements to determine the cause in accordance with the organisation's compliance program/management system 2.2 Develop an appropriate action plan for managing and rectifying an identified breach in accordance with the established breach management procedures and relevant Australian and international standards 2.3 Take prompt action to rectify a breach as per the plan 2.4 Document and report action taken as required
3 Liaise with relevant internal and external personnel	3.1 Maintain appropriate liaison with all relevant internal personnel, and external personnel and organisations on the nature of the breach and the action being taken 3.2 Inform internal and external personnel of progress in rectifying the breach 3.3 Take advice and direction from relevant internal and external personnel on the management and rectification of the breach in accordance with the organisation's compliance program/management system 3.4 Apply effective interpersonal skills
4 Monitor the rectification of a breach	4.1 Closely monitor progress in the rectification of a breach of compliance requirements in accordance with the organisation's compliance program/management system 4.2 Identify problem/s which may arise in breach rectification and take appropriate action to deal with the problem/s and report to appropriate personnel on its management 4.3 Notify all relevant personnel when the identified breach has been successfully rectified
5 Document breach and subsequent rectification	5.1 Prepare and submit all required reports on identified breach and subsequent rectification action to relevant internal and external personnel 5.2 Report systemic and recurring problems of non-compliance to those with sufficient authority to correct them

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ELEMENT	PERFORMANCE CRITERIA
	5.3 Complete records of breach, action taken and the outcomes of rectification processes and file in accordance with the organisation's compliance program/management 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, 1.2, 2.2, 2.3, 3.3, 4.1, 5.3	• Analyses, evaluates and compares industry specific and complex texts to determine and distinguish compliance requirements
Writing	1.2, 2.2, 2.4, 3.1, 3.2, 4.2, 4.3, 4.3, 5.1, 5.2, 5.3	• Produces a range of text types matching style of writing to purpose and audience • Documents and records findings using required organisational formats
Oral Communication	3.1, 3.2, 3.3, 3.4, 4.2, 4.3, 5.2	• 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 and to confirm understanding
Navigate the world of work	1.1, 2.1, 2.2, 3.3, 4.1, 5.3	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	1.2, 2.4, 3.1, 3.2, 3.3, 3.4, 4.2, 4.3, 5.1, 5.2	• Identifies and uses appropriate conventions and practices when seeking or sharing information with internal and external personnel • Identifies relevant information and ideas from a range of oral and written exchanges
Get the work done	1.1, 1.2, 2.2-2.3, 4.1-4.3, 5.1-5.3	• Takes responsibility for developing, implementing and monitoring processes to manage breaches in compliance requirements • Organises, plans and sequences own workload and schedules work activities to achieve required outcomes • Systematically gathers, analyses and evaluates all relevant information in order to make informed decisions about management of compliance breaches

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCOM402 Implement processes for the management of a breach in compliance requirements	BSBCOM402B Implement processes for the management of a breach in compliance requirements	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

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Assessment Requirements for BSBCOM402 Implement processes for the management of a breach in compliance requirements

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 and analyse information required to keep up to date with organisational compliance requirements and relevant Australian and international standards
- monitor the organisation's performance in meeting its compliance requirements
- investigate breaches in meeting compliance requirements according to organisational requirements and relevant Australian and international standards, including:
  - developing and implementing an action plan for managing organisational compliance breaches
  - using effective interpersonal skills when communicating with others to seek or provide information
  - following up on compliance breaches
  - completing required documents, records and reports.

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 compliance requirements applicable to the organisation
- identify strategies for developing a positive compliance culture within the organisation including:
  - analysis techniques relevant to the review and interpretation of an identified breach in compliance requirements
  - breach management policies and processes including identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements
  - compliance related management information systems

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  - compliance reporting procedures
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - documentation of compliance requirements relevant to the organisation
  - liaison procedures with relevant internal and external personnel on compliance related matters
  - processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system
  - record keeping systems required for compliance management
  - reporting processes on compliance management including reports on breaches and rectification action
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
- identify relevant legislation, codes of practice, and Australian and international standards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- standards, legislation, regulations and codes of conduct relevant to job role, occupation or profession
- organisational policies and procedures related to compliance
- computer resources and business technology
- compliance program/management system
- 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

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BSBCOM403 Provide education and training on compliance requirements and 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 provide the training required to effectively implement and maintain an organisation's established compliance program/management system.

It applies to individuals who are responsible for the planning, development and operation of the induction and training components of an organisation's compliance program. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Identify the requirements for induction and ongoing	1.1 Establish compliance requirements relevant to the organisation and the associated compliance program/management system

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ELEMENT	PERFORMANCE CRITERIA
training programs	1.2 Confirm and document the organisation's obligations and responsibilities in providing induction and training activities 1.3 Identify and confirm individual responsibilities of personnel within the organisation to implement the organisation's compliance program/management system 1.4 Assess and document current competence and capacity of personnel to implement and maintain a compliance program/management system 1.5 Determine induction and training needs of personnel to achieve the required levels of competence
2 Plan internal and external compliance education and training systems	2.1 Develop compliance training objectives based on assessed training needs of personnel 2.2 Assess and compare quality and costs of external training options 2.3 Assess ability of organisation to deliver required training internally 2.4 Select and organise appropriate internal compliance training programs and/or external compliance training options to meet assessed compliance management training needs 2.5 Negotiate training options if required 2.6 Prepare and negotiate budget for internal and external compliance training with appropriate organisational personnel 2.7 Identify training personnel requirements and recruit and prepare appropriate staff
3 Organise internal and external compliance education and training systems	3.1 Organise appropriate training and assessment materials and facilities for development or acquisition (where required) 3.2 Prepare and execute implementation plans for the internal and external compliance training as approved 3.3 Negotiate and sign contract/s for required external compliance training as per organisational policies and procedures 3.4 Implement planned corporate induction and training programs
4 Evaluate and monitor the compliance education and training systems	4.1 Prepare operational plan for the monitoring and evaluation of internal and external compliance training systems and seek approval from appropriate personnel 4.2 Identify and organise staff and resources required for the monitoring and evaluation of internal and external compliance training systems

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ELEMENT	PERFORMANCE CRITERIA
	4.3 Implement approved plans for the monitoring and evaluation of internal and external compliance training systems
5 Document the operation of the compliance education and training systems	5.1 Document plans for the development and operation of both internal and external compliance induction and training systems in accordance with organisational requirements 5.2 Prepare, process and store operational reports, certification and training and assessment records 5.3 Prepare and process reports on the outcomes of monitoring and evaluation of compliance induction training systems 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	Performance Criteria	Description
Reading	1.1, 1.4, 2.2, 2.3, 2.4, 2.6, 3.3, 5.1	• Identifies and analyses complex texts in a variety of forms to determine key information, specific requirements and responsibilities
Writing	1.2-1.4, 2.1, 2.6, 3.1, 3.2, 4.1, 5.1, 5.2, 5.3	• Records, collates and compiles information gathered from multiple sources using correct technical and enterprise specific language • Develops materials which incorporate specialised language in a format and style appropriate to audience and context • Composes required documents according to organisational requirements
Oral Communication	1.2, 1.3, 2.5, 2.6, 2.7, 3.3, 4.1	• Discusses compliance issues using structure and language to suit the audience • Uses listening and questioning techniques to confirm understanding of compliance requirements
Numeracy	2.2, 2.6	• Interprets numerical information and applies basic mathematical calculations relating to budgetary information
Navigate the world of work	1.1, 1.3, 3.3, 5.1	• Takes responsibility for developing, implementing and reviewing processes to achieve organisational outcomes
Interact with	1.2, 1.3, 2.5, 2.6,	• Identifies and uses appropriate conventions and

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others	2.7, 3.3, 3.4, 4.1	practices when communicating with internal and external personnel • Identifies relevant information and ideas from a range of messages and oral and written exchanges,
Get the work done	1.4,1.5, 2.1-2.5, 2.7, 3.1-3.4, 4.1-4.3, 5.2, 5.3	• Takes responsibility for planning and implementing tasks required to achieve training objectives • Organises and coordinates resources required for training activities • Systematically analyses information to decide on appropriate training options and activities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM403 Provide education and training on compliance requirements and systems	BSBCOM403B Provide education and training on compliance requirements and 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

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Assessment Requirements for BSBCOM403 Provide education and training on compliance requirements and 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:

- obtain and analyse information required to keep up to date with organisational requirements regarding compliance requirements and obligations to provide training about compliance
- determine induction and training needs of individuals
- arrange training for identified individuals including:
  - developing training objectives
  - assessing and selecting training options
  - developing and implementing plans to execute, monitor and evaluate training
  - organising resource requirements
  - communicating with internal and external personnel
- prepare reports and records relevant to the development and operation of compliance training, according to 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:

- list internal and external training options available to match the needs of the organisation and its staff in compliance related areas
- identify legislation, codes of practice, and Australian and international standards relevant to training and development in compliance management systems.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- standards, legislation, regulations and codes of conduct relevant to job role, occupation or profession
- organisational policies and procedures related to training or induction on compliance
- interaction with others
- computer resources and business technology
- compliance program/management system
- 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

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BSBCOM404 Promote and liaise on compliance requirements, systems and related issues

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 communicate about an organisation's compliance requirements and commitments to staff, agents, contractors and other relevant third parties.

It applies to individuals who use well developed promotional and liaison skills, combined with knowledge of relevant legislative requirements, code/s of practice and internal standards and procedures, to ensure that compliance is an integral part of normal business operations.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Clarify compliance issues on which liaison is required	1.1 Confirm and clarify with relevant internal and external personnel, compliance issues requiring communication 1.2 Seek and/or obtain information during the liaison activity on applicable compliance requirements and related compliance program/management system and summarise in an appropriate format 1.3 Identify, source and interpret sections of relevant Australian and international standards in terms of processes to be followed for promotional and liaison activities
2 Identify the target groups for promotional or liaison activities	2.1 Using appropriate means, identify groups that need to be aware of the organisation's compliance program/management system or that may need to be contacted about compliance issues 2.2 Record information on identified target groups and store in an appropriate format for use in activities to promote the compliance program/management system
3 Identify contacts for liaison	3.1 Identify suitable contacts from own network or with the assistance of relevant internal and external personnel 3.2 Apply search techniques to establish the most suitable contacts for the liaison activities, where appropriate
4 Develop an action plan for the promotional and liaison activities	4.1 Access and review details of the organisation's compliance program/management system 4.2 List internal and external persons and organisations that need to be aware of specific aspects of the compliance program/management system in compliance management promotional and liaison activities 4.3 Prepare an action plan for the compliance management promotional and liaison activities in collaboration with relevant internal and external personnel
5 Assign resources for promotional and liaison activities	5.1 Prepare to implement the planned compliance management promotional and liaison activities and negotiate a suitable budget with authorised personnel for approval 5.2 Assign or acquire physical and human resources for the execution of the planned promotional and liaison activities, in accordance with the approved action plan
6 Communicate with identified contacts	6.1 Make initial contact with identified internal and/or external contacts using appropriate communication techniques 6.2 Ensure the requirements for seeking information are clearly

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ELEMENT	PERFORMANCE CRITERIA
	explained and communicated 6.3 Apply effective interpersonal skills during all communication activities 6.4 Provide accurate and clear details in written, electronic or oral form using appropriate techniques in accordance with relevant internal and external requirements 6.5 Record details of communications conducted as part of compliance related promotional and liaison activities in an appropriate format
7 Manage promotional and liaison activities	7.1 Brief managers and personnel on their roles and responsibilities in the compliance management promotional and liaison activities 7.2 Monitor compliance management promotional and liaison activities against objectives, established performance criteria, milestones and budget targets 7.3 Take appropriate action to ensure promotional activities achieve the planned outcomes within project limits
8 Evaluate promotional and liaison activities	8.1 Collect data and performance indicators from appropriate sources, on the outcomes of compliance management promotional and liaison activities 8.2 Analyse collected evaluation data in terms of planned outcomes and performance criteria 8.3 Summarise the results of the promotional and liaison activities and document identified issues and related recommendations
9 Document promotional activities	9.1 Record, store and disseminate details of the execution of planned compliance management promotional and liaison activities in accordance with the organisation’s policies and procedures 9.2 Prepare and submit reports on the compliance management promotional and liaison activities and ensure the outcomes are relevant to internal and external personnel 9.3 Refer recommendations on improvements to compliance management promotional and liaison activities to relevant managers for appropriate action 9.4 Organise and incorporate information on contacts established during compliance management liaison activities in an appropriate listing of contacts for future liaison activities

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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, 3.2, 4.1, 5.2, 8.2, 9.4	• Locates and analyses complex texts to determine key information, specific requirements and responsibilities
Writing	1.1, 1.2, 2.2, 4.2, 4.3, 6.1-6.5, 7.1, 8.2, 8.3, 9.1-9.4	• Records, collates and compiles information gathered from multiple sources using correct technical and enterprise specific language • Develops materials for specific audiences using correct and enterprise specific language • Prepares information in a designated format and style to convey information, requirements and recommendations
Oral Communication	1.1, 1.2, 3.1, 4.3, 5.1, 6.1-6.4, 7.1	• Discusses compliance issues using structure and language to suit the audience • Uses listening and questioning techniques to confirm understanding of compliance requirements
Numeracy	5.1, 7.2, 8.1-8.3	• Interprets numerical information and applies mathematical calculations relating to budgetary information
Navigate the world of work	1.2, 1.3, 2.1, 3.1, 6.1, 6.4, 9.1	• Takes personal responsibility for following organisational policies, procedures and legislative requirements
Interact with others	1.1, 1.2, 2.1, 3.1, 4.3, 5.1, 6.1-6.4, 7.1, 9.1, 9.3	• Identifies and uses appropriate conventions and practices when communicating with internal and external personnel • Identifies relevant information and ideas from a range of messages and oral exchanges
Get the work done	2.1, 2.2, 3.2, 4.1, 4.2, 5.1, 5.2, 6.5, 7.2, 7.3, 8.2, 8.3, 9.2, 9.3, 9.4	• Takes responsibility for planning and implementing tasks required to achieve promotional objectives in a timely manner • Contributes to continuous improvement of current work practices through consultation and development of appropriate systems • Uses the main features and functions of digital tools to complete work tasks

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCOM404 Promote and liaise on compliance requirements, systems and related issues	BSBCOM404B Promote and liaise on compliance requirements, systems and related issues	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

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Assessment Requirements for BSBCOM404 Promote and liaise on compliance requirements, systems and related issues

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, analyse and summarise information about organisational compliance requirements and relevant Australian and international standards
- identify and liaise with internal and external personnel about the organisation's compliance requirements and commitments
- prepare and implement an action schedule for the compliance management promotional and liaison activities
- monitor and evaluate promotional and liaison activities against the planned outcomes
- analyse, summarise, record and store details of the compliance management promotional and liaison activities in required formats
- prepare and distribute periodic reports on the compliance management promotional and liaison 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:

- identify relevant Australian and international standards
- identify compliance requirements applicable to the organisation
- identify elements of compliance program and related management systems list internal and external personnel with an interest in an organisation's compliance program/management system
- explain techniques suitable for liaising with others on an organisation's compliance program/management system and related issues
- list organisational policies and procedures relevant to compliance areas.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- relevant legislation, codes or practice and Australian and international standards
- physical and human resources for the execution of the planned promotional and liaison activities
- relevant information on the organisation's compliance requirements and related management systems
- computer resources and business technology
- 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

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BSBCOM405 Promote compliance with legislation

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 promote compliance with domestic and international legislation, both by self and others in the workplace.

It applies to individuals with a broad knowledge of international trade who determine compliance strategies and model and encourage compliance by implementing these strategies.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Determine compliance strategies	1.1 Access current information about the range of domestic and international legislation relating to own work 1.2 Clarify compliance requirements to confirm understanding and ensure consistency of interpretation and application 1.3 Obtain advice to assist in applying relevant legislation to own work and identifying compliance requirements 1.4 Access organisation's procedures and practices to facilitate compliance with relevant legislation

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Assess interface with other organisations
2 Model and encourage compliance with legislative requirements	2.1 Apply organisation's procedures and practices to own work practices to meet compliance requirements 2.2 Identify areas of uncertainty in own work related to compliance requirements and take action to clarify issues 2.3 Review own work and seek feedback from others to confirm continuing compliance with legislative requirements 2.4 Evaluate own competence and address any identified gaps 2.5 Identify possible implications of non-compliance and use these to guide own work practices 2.6 Raise inadequacies in organisation's procedures and practices which may contribute to non-compliance in accordance with organisational procedures 2.7 Raise inadequacies with outside organisations' procedures and practices which may contribute to non-compliance in accordance with 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 Criteria	Description
Learning	2.2, 2.3, 2.4	• Identifies personal strengths and weaknesses in different contexts and seeks to develop skills and knowledge in areas of need • Actively seeks and acts on feedback from a number of sources
Reading	1.1, 1.4, 2.3, 2.5, 2.6, 2.7	• Recognises and evaluates complex texts in a variety of forms to determine key information, specific requirements and responsibilities
Writing	2.3, 2.5, 2.6, 2.7	• Records, collates and compiles information gathered from multiple sources using correct technical language • Develops materials for specific audiences to convey information, requirements and recommendations

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Oral Communication	1.2, 1.3, 2.3, 2.6, 2.7	• Discusses compliance issues using structure and language to suit the audience • Uses listening and questioning techniques to confirm understanding of compliance requirements
Navigate the world of work	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.6, 2.7	• Takes personal responsibility for following organisational policies and procedures and keeping up to date with legislative requirements • Formally reflects on performance as an integral part of own development
Interact with others	1.2, 1.3, 2.3, 2.6, 2.7	• Identifies and uses appropriate conventions and protocols when raising issues, and seeking advice or feedback from colleagues and external stakeholders
Get the work done	1.2, 1.5, 2.2, 2.3, 2.4, 2.5, 2.6, 2.7	• Takes responsibility for planning, sequencing and prioritising tasks to achieve efficient and effective outcomes • Evaluates effectiveness of own and organisational systems and processes to inform decisions on how to implement improvements for self and others • 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**
BSBCOM405 Promote compliance with legislation	BSBCOM405A Promote compliance with legislation	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

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Assessment Requirements for BSBCOM405 Promote compliance with legislation

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 compliance requirements related to own role
- apply legislative and organisational compliance requirements to own work
- seek advice or feedback from others about own work
- raise non-compliance issues according to organisational procedures.

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 the legislation related to meeting compliance requirements when completing own work
- list and briefly describe the organisational policies and procedures that assist compliance with relevant legislation
- identify the penalties for non-compliance with legislative requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- organisational compliance program/management system
- relevant legislation and standards
- office equipment and technology
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBCOM406 Conduct work within a compliance framework

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 statutory, legislative and regulatory requirements and relate them to individual work practices to ensure ongoing adherence to the compliance framework.

It applies to individuals who to 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

Regulation, licensing and risk – Compliance

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. Identify individual compliance requirements	1.1 Identify and document statutory, legislative and regulatory requirements relevant to job role, occupation or profession 1.2 Identify and document relevant organisational and industry requirements
2. Interpret individual compliance requirements	2.1 Map compliance requirements against individual position description and work practices 2.2 Discuss ethical considerations with relevant parties where

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ELEMENT	PERFORMANCE CRITERIA
	appropriate
3. Ensure individual compliance	3.1 Consult with appropriate persons to identify procedures to be applied, contingent on the situation 3.2 Reflect on personal actions in the context of compliance requirements 3.3 Record action taken if required
4. Identify and adapt to changes in compliance requirements	4.1 Access and analyse documentation relating to changes in compliance issues 4.2 Discuss documentation with appropriate persons to ensure ongoing compliance

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	3.2	• Reflects on own actions to improve future performance
Reading	1.1, 1.2, 4.1	• Identifies and analyses complex texts to determine key information, specific requirements and responsibilities
Writing	1.1, 1.2, 2.1, 3.3	• Collates and compiles information gathered from multiple sources in required format for using correct technical and enterprise specific language •
Oral Communication	2.2, 3.1, 4.2	• Discusses compliance or ethical issues using structure and language to suit the audience • Uses listening and questioning techniques to confirm understanding of compliance requirements
Navigate the world of work	2.2, 3.1, 4.1	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	2.2, 3.1, 4.2	• Selects and uses appropriate communication conventions and practices when discussing, seeking or sharing information
Get the work	1.1, 1.2, 2.1, 3.3,	• Takes responsibility for planning and implementing tasks required to achieve efficient and effective

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done	4.1, 4.2	outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM406 Conduct work within a compliance framework	BSBCOM406A Conduct work within a compliance framework	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

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Assessment Requirements for BSBCOM406 Conduct work within a compliance framework

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:

- conduct work according to relevant statutory, legislative and regulatory requirements relating to work practices
- analyse and keep up to date with compliance requirements
- map compliance requirements to work practices and position description
- seek advice and discuss ethical considerations
- reflect on personal actions.

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 statutory, legislative and regulatory requirements relevant to job role, occupation or profession
- outline codes of practice relevant to job role, occupation or profession
- explain organisational policies and procedures relevant to workplace
- explain individual work requirements and practices as contained in position description and occupational standards
- outline statutory requirements and codes of conduct in context of individual job role.

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 – compliance field of work and include access to:

- legislation, regulations and codes of conduct relevant to job role, occupation or profession

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- information about relevant professional associations
- position descriptions
- organisation policies and procedures relevant to job role, occupation or profession
- case studies and, where possible, real situations.

Assessors must satisfy NVRAQTF assessor requirements.

Links

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

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BSBCOM501 Identify and interpret compliance requirements

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 and interpret the range of internal and external compliance requirements and obligations that must be fulfilled by an organisation.

It applies to individuals who use their sound theoretical 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

Regulation, licensing and risk – compliance

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 Clarify the scope of operations	1.1 Identify and review the relevant range of operations and the sphere of business arrangements of the organisation 1.2 Conduct an analysis of the operations and business arrangements of the organisation and identify the functions, products and services that may be subject to compliance requirements 1.3 Develop and document work activity plans for determining

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ELEMENT	PERFORMANCE CRITERIA
	relevant compliance requirements 1.4 Obtain approval of plans from relevant organisational personnel
2 Identify compliance requirements	2.1 Conduct a search of information on internal and external compliance requirements using appropriate search resources, including relevant Australian and international standards 2.2 Ensure the search of compliance requirements scans across all relevant jurisdictions of laws, regulations, and industry and organisational codes and standards and identify pertinent compliance requirements 2.3 Progressively review information collected in terms of its relevance to the organisation's operations, services and products 2.4 Organise and store gathered information on relevant compliance requirements in an appropriate format for further analysis
3 Interpret, analyse and prioritise identified compliance requirements	3.1 Review and interpret collected information in terms of its relevance to the organisation's functions, services and products 3.2 Discuss and clarify with relevant internal or external personnel ambiguities, uncertainties and problems experienced in interpreting identified compliance information 3.3 Identify, analyse and prioritise relevant compliance requirements in terms of critical implications for the organisation and risks and consequence of possible breaches 3.4 Group pertinent compliance requirements into those that are critical and central to the organisation's operations, those that are important in some circumstances but are not central to the organisation's operations, and those that are pertinent but are incidental to the organisation's operations
4 Document compliance requirements	4.1 Organise and document outcomes of the identification and interpretation activities 4.2 Prepare and communicate reports of relevant compliance requirements and assessment of implications to relevant personnel performing specific compliance management functions

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.2, 2.3, 3.1, 3.3, 3.4	• Identifies, interprets, analyses or reviews complex texts from various sources to determine legal requirements, organisational operations, specific requirements and responsibilities
Writing	1.2, 1.3, 1.4, 2.4, 3.2, 3.3, 3.4, 4.1, 4.2	• 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
Oral Communication	1.4, 3.2, 4.2	• Presents specialised information using structure and language to suit the audience • Uses appropriate techniques, including active listening and questioning, to seek approvals and to confirm understanding
Navigate the world of work	1.2, 2.2, 3.1, 3.3	• Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulations
Interact with others	1.4, 3.2, 4.2	• Identifies and uses appropriate conventions and practices when communicating with internal and external personnel
Get the work done	1.1, 1.3, 2.1-2.4, 3.1, 3.3, 3.4, 4.1, 4.2	• Plans, organises and implements activities required to identify, prioritise and document compliance requirements • Systematically gathers, analyses and evaluates all relevant information in order to make informed decisions about management of compliance breaches • Uses digital tools and systems to locate, organise and share information in effective ways

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCOM501 Identify and interpret compliance requirements	BSBCOM501B Identify and interpret compliance requirements	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

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Assessment Requirements for BSBCOM501 Identify and interpret compliance requirements

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:

- analyse an organisation's operations to identify areas subject to compliance requirements
- interpret and analyse information from Australian and international standards, legislation, regulations, industry and organisational codes of practice to determine their relevance to the organisation
- document and store the outcomes of identification and interpretation activities related to the organisation's compliance requirements
- report on key compliance requirements and the implications of these for 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:

- outline elements of compliance programs and related management systems breaches
- identify relevant Australian and international standards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- relevant Australian and international standards, laws, regulations, industry and organisational codes and standards
- appropriate computer resources for online searching
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBCOM502 Evaluate and review compliance

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 evaluate and review an organisation's compliance program/management system and how it is fulfilling its obligations and responsibilities under applicable compliance requirements.

It applies to individuals who are responsible for evaluating and reporting on the operation and effectiveness of an organisation's planned compliance program/management system to ensure that compliance is an integral part of normal business operations.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Develop the evaluation	1.1 Obtain details of the organisation's compliance policies,

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ELEMENT	PERFORMANCE CRITERIA
plan	objectives and assessment criteria 1.2 Obtain and interpret information on current compliance requirements applicable to the organisation 1.3 Develop a suitable evaluation methodology to enable sufficiently valid and reliable outcomes for the required research and suitable arrangements for both internal and external monitoring processes 1.4 Prepare the evaluation plan for the proposed project including the detailing of established evaluation criteria and the data to be collected 1.5 Obtain approval of plan from relevant internal and/or external personnel
2 Gather required evaluation data	2.1 Collect relevant evaluation data on how the organisation is fulfilling its compliance requirements using appropriate techniques and sources in accordance with the agreed evaluation plan 2.2 Organise, interpret and review collected data against established evaluation criteria including those specified in relevant Australian and international standards 2.3 Discuss ambiguities, uncertainties and problems experienced while interpreting collected data and address appropriately in conjunction with relevant internal and/or external personnel 2.4 Organise interpreted evaluation data for later analysis
3 Analyse the collected data	3.1 Analyse evaluation data in accordance with planned methodology 3.2 Review and discuss outcomes and findings of the analysis with relevant internal and/or external personnel
4 Determine evaluation findings and outcomes	4.1 Develop and discuss preliminary findings and any identified issues with relevant internal and/or external personnel 4.2 Undertake any additional data collection and analysis required to clarify aspects of findings, issues and related action options if necessary 4.3 Prepare recommendations for any action to improve identified deficiencies in conjunction with relevant internal and/or external personnel
5 Document and disseminate the outcomes and recommendations of the evaluation	5.1 Prepare a draft report of the outcomes, findings and recommendations of the compliance evaluation in accordance with the agreed structure and format and distribute to relevant internal and/or external personnel for comment and feedback

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ELEMENT	PERFORMANCE CRITERIA
	5.2 Edit the report based on the feedback obtained 5.3 Proofread the report in preparation for publishing 5.4 Ensure the report of outcomes, findings and recommendations of the evaluation is signed off by authorised personnel 5.5 Produce and disseminate the report to nominated internal and external personnel in accordance with agreed arrangements

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, 3.1, 3.2, 4.2, 5.2, 5.3	• Identifies, interprets, analyses or reviews complex texts from various sources to determine legal requirements, organisational operations, specific requirements and responsibilities • Checks documents for accuracy of content, consistency of layout and grammar, spelling and punctuation
Writing	1.3-1.52.2, 4.1-4.3, 5.1-5.	• 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
Oral Communication	2.3, 3.2, 4.1,	• Presents specialised information using structure and language to suit the audience • Elicits the view and opinions of others by listening and questioning
Navigate the world of work	1.1-1.3, 2.2	• Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulations
Interact with others	1.2, 1.5, 2.1, 2.3, 3.2, 4.1-4.3, 5.1, 5.4,	• Identifies and uses appropriate conventions and practices when communicating with internal and

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	5.5	external personnel
Get the work done	1.3, 1.4, 2.1-2.4, 3.1, 4.2, 4.3, 5.1, 5.4, 5.5	• Plans, develops, implements and monitors processes for evaluating and reviewing compliance performance • Systematically gathers, analyses and evaluates all relevant information in order to identify issues and make informed recommendations about compliance issues • Uses digital tools and systems to locate, organise and share information in effective ways

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM502 Evaluate and review compliance	BSBCOM502B Evaluate and review compliance	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

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Assessment Requirements for BSBCOM502 Evaluate and review compliance

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 and interpret information about Australian and international standards related to compliance requirements
- develop an evaluation methodology including:
  - preparation of an evaluation plan
  - analysis and interpretation of collected data and feedback with/from stakeholders
- prepare and submit final report for approval and implementation.

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 evaluation methods and techniques suitable for compliance related evaluation and review
- list sources of data relevant to compliance related evaluation and review
- identify relevant Australian and international standards
- outline elements of relevant compliance program/management systems
- identify relevant organisational policies and procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

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- relevant Australian and international standards, laws, regulations, industry and organisational codes and standards
- relevant data
- office equipment and business technology
- computer resources for online searching
- 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

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BSBCOM503 Develop 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 1.0.

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 planned compliance program/management system to ensure that compliance is an integral part of normal business operations.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Develop procedures for responding to breaches	1.1 Obtain and interpret information on current compliance requirements applicable to the organisation 1.2 Review each area of compliance requirement to establish potential breaches 1.3 Develop and document appropriate procedures for identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements
2. Monitor adherence to compliance requirements	2.1 Monitor and evaluate organisation operations to identify incidences of breaches in compliance requirements 2.2 Review and evaluate complaints and other sources of information on potential breaches in compliance requirements 2.3 Interrogate compliance management information system to identify any indication of breaches in compliance requirements
3. Manage the identification and rectification of breaches in compliance	3.1 Assign appropriate staff to take the required action to identify, classify, investigate and rectify breaches in compliance requirements 3.2 Ensure senior management team within the organisation is informed of all breaches in compliance requirements
4. Liaise with others during breach management	4.1 Maintain liaison with relevant regulatory authorities and other organisations with an interest in compliance in regard to breaches in requirements and related action being taken 4.2 Take advice from relevant internal and external personnel on the management of breaches in compliance requirements and act upon this advice appropriately
5. Evaluate the response to and rectification of, breaches	5.1 Monitor action taken to manage and rectify an identified breach in compliance requirements in terms of the organisation's compliance policy 5.2 Confirm success in rectification of compliance breaches and notify relevant internal and external personnel 5.3 Recognise problems in the rectification of compliance breaches and initiate appropriate action to ensure that management of the breach is maintained 5.4 Refer reports of systemic and recurring problems of non-compliance to those with sufficient authority to correct them
6. Document and disseminate breach management activities	6.1 Document and report identified breaches in compliance requirements in accordance with relevant internal and external requirements

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ELEMENT	PERFORMANCE CRITERIA
and outcomes	6.2 Maintain and store records of breaches in compliance requirements 6.3 Report on the action taken to rectify identified breaches in compliance requirements and the outcomes of this action 6.4 Disseminate reports on breach management to relevant internal and external personnel

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, 3.1, 4.2	• Recognises and evaluates complex texts in various forms to determine key information and specific requirements and responsibilities • Analyses and compares industry specific and complex texts to determine and distinguish compliance requirements
Writing	1.3, 3.2, 5.2, 5.4, 6.1, 6.3	• Produces a range of text types matching style of writing to purpose and audience • Documents and records findings using required organisational formats
Oral Communication	3.1, 4.1, 4.2	• 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
Navigate the world of work	1.1, 1.3, 4.1, 4.2, 5.1, 6.1	• Understands how own role meshes with others and contributes to broader organisational goals • Modifies or develops organisational procedures to comply with legislative and organisational requirements • Keeps up to date with changes to legislation or regulations relevant to own responsibilities
Interact with others	3.1, 3.2, 4.1, 4.2, 5.2, 5.4, 6.1, 6.3	• Identifies and uses appropriate conventions and protocols when communicating with internal and external personnel

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Get the work done	1.2, 1.3, 2.1, 2.2, 2.3, 3.1, 5.1, 5.3, 6.2, 6.4	• Takes responsibility for developing, implementing and monitoring processes to manage breaches in compliance requirements • Organises, plans and sequences own workload and schedules work activities of others • Systematically gathers, analyses and evaluates all information in order to make informed decisions about management of compliance breaches • Uses a range of digitally based technology and applications to access, organise, integrate and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM503 Develop processes for the management of breaches in compliance requirements	BSBCOM503B Develop processes for the management of breaches in compliance requirements	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

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Assessment Requirements for BSBCOM503 Develop 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 1.0.

Performance Evidence

Evidence of the ability to:

- obtain and keep up to date with organisational compliance requirements
- develop procedures for managing organisational compliance breaches
- monitor the organisation’s compliance to requirements including:
- review complaints
- interrogate the management information system
- identify and assign staff to manage breaches in compliance requirements
- identify and inform senior management and regulatory authorities of breaches in compliance
- seek advice from internal and external personnel
- follow up on compliance breaches.

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 analysis techniques relevant to the review and interpretation of an identified breach in compliance requirements
- outline the compliance requirements applicable to the organisation
- outline elements of a compliance program/management system including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management

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  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management
  - processes for the internal and external communication and promotion of information on compliance requirements and compliance program/management system
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - strategies for developing a positive compliance culture within the organisation
  - techniques and performance indicators for monitoring the operation of a compliance/program management system
- list internal and external job roles with an interest in compliance
- describe organisational responsibilities for compliance
- identify the planning processes of the organisation
- outline potential breaches in compliance requirements
- identify relevant organisational policies and procedures including:
  - procedures for breaches in compliance requirements
  - compliance plans and policies in various compliance areas
  - organisational standards for operations and ethics
- explain reporting processes on compliance management including reports on breaches and rectification action
- identify sections of relevant Australian and international standards dealing with aspects of breach management processes and responsibilities
- identify relevant standards for quantitative and qualitative data analysis techniques relevant to compliance related evaluation.

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 – compliance field of work and include access to:

- relevant legislation, regulations, standards and organisational policies and procedures
- data files
- relevant internal and external personnel
- computer resources and business technology
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBCOM601 Research compliance requirements and issues

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 explore and investigate various aspects and issues associated with compliance requirements and a related compliance program/management system.

It applies to individuals in regulatory authorities or large organisations with responsibilities related to identifying and investigating impacts, issues and policy implications of various aspects of compliance. It also applies to internal or external consultants who carry out research activities for clients on various aspects of compliance as a compliance researcher or member of a compliance management team.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Clarify the purpose and scope of the research	1.1 Confirm and clarify the purpose and scope of the required compliance related research in collaboration with the client/s and relevant internal and/or external personnel 1.2 Document the purpose and scope of the required research in accordance with organisational and/or client requirements

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ELEMENT	PERFORMANCE CRITERIA
2 Develop the research plan	2.1 Develop a suitable research methodology to enable sufficiently valid and reliable outcomes for the required research 2.2 Prepare the research plan for the proposed project 2.3 Obtain approval of plan from relevant internal and/or external personnel
3 Gather required research data	3.1 Collect relevant research data using appropriate research techniques and sources in accordance with the agreed research plan 3.2 Gather and interpret from appropriate sources, information on relevant Australian and international standards pertaining to compliance requirements and related systems 3.3 Organise, interpret and review collected data in terms of its relevance to the project's purpose and objectives 3.4 Discuss ambiguities, uncertainties and problems experienced while interpreting collected data and address appropriately in conjunction with relevant internal or external personnel 3.5 Organise interpreted research data for later analysis
4 Analyse collected data	4.1 Analyse data in accordance with planned methodology 4.2 Review and discuss outcomes of the analysis with relevant internal or external personnel
5 Determine research findings and outcomes	5.1 Interpret the outcomes of the data analysis in accordance with the project objectives 5.2 Develop and discuss preliminary findings, identified issues and related recommendations with relevant internal and/or external personnel 5.3 Undertake any additional data collection and analysis required to clarify aspects of findings, issues and related action options
6 Document and disseminate research outcomes	6.1 Prepare a draft report of the research outcomes, findings and recommendations in accordance with the agreed structure and format, and distribute to relevant internal and/or external personnel for comment and feedback 6.2 Edit the report based on the feedback obtained 6.3 Proofread the report prior to publication 6.4 Ensure the outcomes, findings and recommendations in the report are signed off by authorised personnel 6.5 Produce and disseminate the report to nominated internal

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ELEMENT	PERFORMANCE CRITERIA
	and/or external personnel in accordance with agreed arrangements

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, 3.1, 3.2, 3.4, 3.5, 4.1, 5.2, 6.2, 6.3	• Comprehends and analyses texts to identify key requirements • Identifies, analyses, reviews and extracts relevant information from complex texts • Proofreads draft texts to identify changes required
Writing	1.2, 2.1-2.3, 3.2-3.4, 4.2, 5.2, 6.1-6.3	• Collates, summarises and compiles information from a range of sources • Develops reports for a specific audience using clear and detailed language to convey findings and recommendations • Edits and incorporates amendments to ensure compliance with regulatory or organisational requirements
Oral Communication	1.1, 2.3, 3.4, 4.2, 5.2	• Conveys information, in a format and style appropriate to a specific audience • Elicits the views and opinions of others by listening and questioning
Navigate the world of work	3.2	• Identifies organisational implications of legislative requirements and considers these when planning and implementing work
Interact with others	1.1, 2.3, 3.4, 4.2, 5.2	• Collaborates with others using effective interpersonal skills to facilitate shared understanding • Identifies and uses appropriate conventions and practices when communicating with internal and external personnel
Get the work done	1.2, 2.1, 2.2, 3.1-3.5, 4.1, 4,2, 5.1-5.3, 6.1-6.5	• Sequences and schedules complex activities, monitors implementation and manages required communication with others • Gathers and analyses data and feedback to improve outcomes • Utilises features and functions of digital tools to

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		complete complex tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM601 Research compliance requirements and issues	BSBCOM601B Research compliance requirements and issues	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

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Assessment Requirements for BSBCOM601 Research compliance requirements and issues

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 and interpret information on relevant Australian and international standards
- collaborate with others to identify and document the purpose and scope of the compliance research
- plan the research requirements including:
  - selecting an appropriate research methodology
  - preparing a research plan
  - getting approval for the plan from appropriate people
- carry out the research according to the approved plan including:
  - collecting, organising, analysing and interpreting data
  - reviewing and discussing analysis and preliminary outcomes with relevant l personnel
- prepare and distribute report of the research outcomes according to 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:

- explain compliance requirements relevant to the organisational research methods
- explain elements of relevant compliance program/management systems
- describe quantitative and qualitative data analysis techniques relevant to compliance related research
- list relevant Australian and international standards
- identify relevant organisational policies and procedures
- identify sources of information relevant to compliance related research.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- organisational information and Australian and international standards related to compliance requirements
- relevant personnel
- computer resources and business equipment
- 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

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BSBCOM602 Develop and create compliance requirements

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, develop and validate compliance requirements.

It applies to individuals who are responsible for the compliance requirements of an organisation. It also applies to individuals in regulatory authorities, licensing authorities, statutory standards authorities, professional associations and institutes, government departments or other organisations who are responsible for establishing compliance requirements to be fulfilled by other organisations and personnel.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Clarify the purpose and scope of the proposed compliance requirements	1.1 Determine the authority for the compliance requirements in conjunction with relevant personnel 1.2 Clarify the purpose of the compliance requirements with relevant authorised personnel 1.3 Determine the scope of the proposed compliance requirements in consultation with relevant internal and/or external personnel 1.4 Clarify the implications of non-compliance with the proposed compliance requirements and evaluate in consultation with relevant internal and/or external personnel 1.5 Identify and interpret relevant Australian and international standards pertaining to the proposed compliance requirements and related compliance program/management system
2 Prepare the development plan	2.1 Establish a suitable project methodology to identify and consult with relevant stakeholders who have an interest in the proposed compliance requirements 2.2 Prepare the plan for the proposed project to develop compliance requirements 2.3 Obtain approval of plan from relevant internal and/or external personnel
3 Consult with relevant stakeholders	3.1 Identify relevant internal and/or external stakeholders in the compliance requirements 3.2 Consult stakeholders on compliance requirements in accordance with the established methodology 3.3 Interpret, analyse and organise outcomes of consultations with stakeholders 3.4 Summarise findings and issues determined through the consultation process and draft appropriate recommendations on compliance requirements
4 Prepare the initial draft report on the proposed compliance requirements	4.1 Prepare the initial draft report on the proposed compliance requirements including information on the findings, issues and recommended requirements identified through the consultation processes 4.2 Submit draft report to the development team for consideration and make any changes required in preparation for validation consultations
5 Obtain feedback on draft compliance	5.1 Determine an appropriate sample of stakeholders for the validation process in collaboration with the other members of the

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ELEMENT	PERFORMANCE CRITERIA
requirements	development team in accordance with the established methodology 5.2 Disseminate the draft compliance requirements to the identified sample of stakeholders using appropriate techniques and technology 5.3 Collate, interpret and analyse feedback received on the draft compliance requirements 5.4 Summarise and organise outcomes of the feedback process in preparation for editing of the draft compliance requirements
6 Edit and document recommended compliance requirements	6.1 Edit the draft compliance requirements appropriately based on the feedback obtained from stakeholders 6.2 Format and proofread the edited compliance requirements in accordance with the agreed methodology 6.3 Submit the recommended compliance requirements in the required format to authorised personnel for consideration and due process for approval and implementation

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, 3.3, 3.4, 4.1, 5.3, 5.4, 6.1, 6.2	• Comprehends and analyses texts to identify key requirements • Identifies, analyses, reviews and extracts relevant information from complex texts • Proofreads draft texts to identify changes required
Writing	2.1-2.3, 3.3. 3.4, 4.1, 4.2, 5.3, 5.4, 6.1, 6.2	• Collates, summarises and compiles information from a range of sources • Develops materials for a specific audience using clear and detailed language to convey findings and recommendations • Edits and incorporates amendments to ensure compliance with regulatory or organisational requirements
Oral Communication	1.1-1.4, 2.3, 3.2, 5.1	• Conveys or seeks information, in a format and style appropriate to a specific audience

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		• Elicits the views and opinions of others by listening and questioning
Navigate the world of work	1.5	• Identifies organisational implications of legislative requirements and considers these when planning and implementing work
Interact with others	1.1-1.4, 2.3, 3.2, 5.1	• Collaborates with others using effective interpersonal skills to facilitate shared understanding • Identifies and uses appropriate conventions and practices when communicating with internal and external personnel
Get the work done	1.4, 1.5, 2.1, 2.2, 2.3, 3.1-3.3, 4.1, 4.2, 5.1-5.4, 6.1-6.3	• Sequences and schedules complex activities, monitors implementation and manages required communication with others • Gathers and analyses data and feedback to improve outcomes • Utilises features and functions of digital tools to complete complex tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM602 Develop and create compliance requirements	BSBCOM602B Develop and create compliance requirements	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

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Assessment Requirements for BSBCOM602 Develop and create compliance requirements

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 and interpret information on relevant Australian and international standards
- collaborate with others to clarify the purpose and scope of the compliance requirements
- plan the compliance requirements using a suitable project methodology
- consult relevant stakeholders about compliance requirements according to the approved plan
- prepare draft recommendations on compliance requirements based on information collected during consultations
- collaborate with others to conduct a validation process on the draft compliance requirements
- document the final compliance requirements according to 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 relevant compliance requirements
- explain methods and techniques suitable for the development and creation of compliance requirements
- outline elements of compliance program/management systems including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management

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  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management
  - processes for the internal and external sharing and promotion of information on compliance requirements and a compliance program management system
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - strategies for developing a positive compliance culture within the organisation
  - techniques and performance indicators for monitoring the operation of a compliance program/management system
  - reporting processes on compliance management including reports on breaches and rectification action.
- explain relevant organisational policies and procedures including compliance plans in various compliance area and organisational standards for operations and ethics.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the compliance field of work and include access to:

- organisational policies and procedures and documentation relevant to compliance requirements
- Australian and international standards relevant to compliance requirements
- interaction with others
- computer resources and business technology
- 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

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BSBCOM603 Plan and establish compliance 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 plan and establish appropriate compliance program/management systems which enable an organisation to fulfil its obligations and responsibilities under applicable compliance requirements.

It applies to individuals who have specific responsibility for the planning, development and operation of a compliance program/management system.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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

Unit Sector

Regulation, Licensing and Risk – Compliance

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 Determine applicable compliance requirements	1.1 Obtain and interpret information on current compliance requirements applicable to the organisation 1.2 Review each compliance requirement in terms of the

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Element	Performance Criteria
	relevant internal and external authorities, the risks involved, ways of ensuring compliance, the penalties for a breach of compliance, and the areas and operations of the organisation most affected
2 Identify and select an appropriate compliance program/management system	2.1 Investigate each area of applicable compliance to determine available options for a compliance program/management system that would be consistent with relevant Australian and International standards 2.2 Review and compare the options for a suitable compliance program/management system and its various components on the basis of established criteria 2.3 Select an appropriate compliance program/management system for implementation
3 Plan required compliance program/management system	3.1 Determine and document components for the proposed compliance program/management system 3.2 Determine personnel requirements for the operation of the compliance program/management system and assign or recruit appropriate staff 3.3 Identify training requirements for the implementation of the proposed compliance program/management system and select suitable training options 3.4 Identify and document management information systems requirements for effective and efficient operation of the compliance program/management system 3.5 Select a complaints management system suitable for the organisation and its compliance responsibilities 3.6 Determine a strategy for developing a compliance management culture in collaboration with relevant internal and external personnel 3.7 Identify and document suitable processes and procedures for identifying and managing breaches in compliance requirements 3.8 Determine reporting requirements in the various areas of compliance and develop suitable processes and procedures to meet these requirements 3.9 Ensure identified resources including human resources required for developing, implementing, reviewing and maintaining the proposed compliance program/management system are budgeted and assigned

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Element	Performance Criteria
4 Document required compliance program/management system	4.1 Document the specifications for the various components of the proposed compliance program/management system in accordance with organisational procedures and any relevant statutory requirements 4.2 Document an action schedule for implementing, reviewing and maintaining the planned compliance program/management system and disseminate to relevant internal and external personnel 4.3 Seek approval from appropriate internal and external personnel or authorities prior to establishing the proposed compliance program/management system
5 Establish the planned compliance program/management system	5.1 Appoint and train assigned managers and operations personnel if required, before they assume their compliance management responsibilities 5.2 Establish the components of the compliance program/management system in collaboration with assigned staff 5.3 Monitor operation of the compliance program/management system in collaboration with assigned staff as per the approved plan 5.4 Conduct periodic reviews of the compliance program/management system in collaboration with assigned staff as per the approved plan 5.5 Prepare reports on the operation and review of the compliance program/management system in accordance with established procedures and any statutory or other compliance obligations

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, 2.2, 3.1, 3.2, 3.3, 3.4	• Investigates and evaluates complex texts to determine key information and specific requirements and responsibilities

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Writing	1.1, 3.1, 3.4, 3.6, 3.7, 4.1, 4.3, 5.2, 5.4, 5.5	• Develops material for a specific audience using clear and detailed language to convey information, requirements and recommendations • Collates and compiles data to convey specific information, requirements and recommendations • Edits and incorporates amendments, as required to ensure compliance with regulatory requirements
Oral Communication	3.6, 4.3, 5.2, 5.4	• Conveys information, which incorporates evaluation of information and specialised and cohesive language, in a format and style appropriate to a specific audience • Elicits the view and opinions of others by listening and questioning
Navigate the world of work	all	• Takes responsibility for developing, implementing and reviewing policies, procedures and processes in accordance with organisational and legislative requirements
Get the work done	1.2, 2.1-2.3, 3.2, 3.3, 3.5, 3.6, 3.8, 3.9, 4.2, 5.1- 5.4	• Plans strategic priorities and outcomes within a flexible, efficient and effective context in a diverse environment exposed to competing demands • Explores and incubates new and innovative ideas through unconstrained analysis and critical thinking to develop compliance program/management systems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCOM603 Plan and establish compliance management systems	BSBCOM603C Plan and establish compliance management systems	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBCOM603 Plan and establish compliance 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:

- plan for and set up a compliance program/management system, in collaboration with relevant personnel, using research methods and techniques suitable for conducting compliance related research projects
- review the organisational compliance requirements against legislation, regulations and standards
- plan for, identify and select a suitable compliance system
- prepare specifications
- document an action schedule for implementing, maintaining and reviewing the compliance system
- appoint and train staff on using the compliance system
- monitor and review the compliance 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:

- explain research methods and techniques suitable for conducting compliance related research projects
- describe the application of quantitative and qualitative data analysis techniques to compliance related research
- summarise relevant aspects of Australian and international standards
- outline elements of compliance program/management systems including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation

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  - compliance related management information systems
  - record keeping systems required for compliance management
  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management
  - processes for the internal and external promulgation and promotion of information on compliance requirements and a compliance program management system
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - strategies for developing a positive compliance culture within the organisation
  - techniques and performance indicators for monitoring the operation of a compliance program/management system
  - reporting processes on compliance management including reports on breaches and rectification action
- explain relevant organisational policies and procedures including compliance plans in various compliance areas and organisational standards for operations and ethics.

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 – compliance field of work and include access to:

- organisational policies and procedures and documentation relevant to compliance requirements
- interaction with others
- legislation, regulations and standards for compliance
- computer resources and business technology
- 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

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BSBCON401 Work effectively in a business continuity context

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 the organisation's overall business continuity management framework and support business continuity strategies.

It applies to individuals working in administrative and/or support roles who require a basic knowledge of the processes relating to the organisation's business continuity requirements.

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

Unit Sector

Industry Capability – Continuity

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 Demonstrate an understanding of the business continuity management framework	1.1 Access the business continuity management framework, and related policies and procedures 1.2 Analyse the key elements of the business continuity management framework within the organisation to determine their impact 1.3 Within authority of own work role, contribute to review of business continuity management framework, policies and procedures 1.4 Participate in emergency response and business continuity

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ELEMENT	PERFORMANCE CRITERIA
	management framework training and exercises as required
2 Support the organisation's business continuity strategies	2.1 Demonstrate an awareness of internal and external risk context relevant to organisation 2.2 Review and provide feedback on outcomes of the business impact assessment/s 2.3 Participate in risk treatment reviews 2.4 Identify and record the organisation's emergency response, continuity and recovery strategies 2.5 Identify own role and responsibility within organisation's business continuity plan/s 2.6 Identify and report to management on any new or emerging risk or incident

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	1.4	• Participates in training activities to improve own knowledge and skills
Reading	1.1, 2.2, 2.3	• Analyses textual information from a range of sources and identifies relevant information to understand the business framework and continuity strategies
Writing	2.4	• Develops material to convey explicit information and results, using clear language and appropriate structure for audience and context
Oral Communication	2.2, 2.3	• Articulates information clearly, using language and tone appropriate to audience and environment • Uses listening and questioning techniques to confirm understanding
Navigate the world of work	1.1, 1.3, 2.1, 2.5	• Understands and responds to explicit and implicit organisational protocols relating to own work • Understands the nature and purpose of own role and associated responsibilities and how it contributes to the work of others in the immediate work context

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Interact with others	2.2, 2.3, 2.6	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates with others to achieve joint outcomes
Get the work done	1.1, 1.2, 2.5	• Applies formal processes when producing plans and uses logically sequenced steps in addressing work requirements • 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**
BSBCON401 Work effectively in a business continuity context	BSBCON401A Work effectively in a business continuity context	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

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Assessment Requirements for BSBCON401 Work effectively in a business continuity context

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:

- assess and review business continuity organisational policies and procedures and risk treatments
- undertake emergency response and business continuity training
- identify own role within the organisation's emergency response and continuity strategy
- recognise internal and external risks and report to senior personnel.

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 overall operations of the organisation, including existing data and information systems
- explain how own role contributes to the work of others
- identify the relevant legislation, regulations, standards and codes of practice that impact business continuity.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – continuity field of work and include access to:

- risk management policies and procedures
- business continuity management framework
- business impact assessments and strategies
- case studies and, where possible, real situations.

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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

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BSBCON601 Develop and maintain business continuity 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 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.

It applies to individuals working in positions of authority who are approved to implement change across the division, business area, program area or project area.

This unit addresses the knowledge and processes necessary to develop and maintain business continuity requirements. Business continuity awareness and planning help the organisation to identify barriers and/or interruptions and determine how the organisation will achieve critical business objectives (even at diminished capacity) until full functionality is restored.

The focus is on risk and vulnerability assessment, business impact assessments, and business continuity and communication plans.

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

Unit Sector

Industry Capability – Continuity

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Conduct risk and vulnerability assessments	1.1 Identify the relationship between corporate risk and organisation's business continuity management framework 1.2 Analyse and determine internal and external risk context by collecting information relating to the organisation's priorities, operations and environment 1.3 Analyse and identify potential internal and external sources of disruption to the organisation's priorities, operations and environment
2 Develop and report business impact assessment/s	2.1 Identify the organisation's critical business functions and its dependencies and interdependencies, and analyse and evaluate risks through business impact assessment/s 2.2 Develop risk and disruption scenarios through business impact assessment/s 2.3 Validate risk and disruption scenarios through business impact assessment/s 2.4 Analyse, validate and report on the outcomes of business impact assessment/s to management
3 Develop, implement and report risk treatments	3.1 Develop and implement risk treatments 3.2 Participate in risk treatment review 3.3 Report risk treatment review to management and relevant personnel 3.4 Update risk treatment review in line with feedback provided by relevant personnel
4 Determine interdependencies and develop response strategies	4.1 Develop the organisation's emergency response, continuity and recovery strategies 4.2 Consult and seek endorsement on organisation's emergency response, continuity and recovery strategies from management and other appropriate personnel 4.3 Identify and manage synergies and conflicts in resource availability and access in conjunction with management 4.4 Coordinate the organisation's emergency response, continuity and recovery strategies
5 Establish business continuity plan	5.1 Consult relevant personnel and seek support for the development of the organisation's business continuity plan/s 5.2 Ensure content of business continuity plan is comprehensive and meets, where applicable, requirements of regulations,

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ELEMENT	PERFORMANCE CRITERIA
	standards, industry practice and geographical dispersion 5.3 Document and analyse feedback received through consultation and finalise business continuity plan 5.4 Demonstrate accountability for organisation's business continuity plan/s
6 Establish communication plan within organisation's planning framework	6.1 Identify stakeholders and determine objective and scope of communication plan for periods before, during and after disruptions occur 6.2 Determine organisation's communication capabilities in line with objectives and scope, and identify gaps and options for meeting shortfalls 6.3 Develop and implement across the organisation, appropriate risk and incident monitoring, reporting and escalation processes
7 Deliver business continuity professional development activities	7.1 Promote application of business continuity management framework and plan to all relevant personnel on an ongoing basis 7.2 Provide staff with appropriate information on cyclical review process of the business continuity management plan 7.3 Conduct business continuity management plan exercises in line with organisation's policies and procedures 7.4 Conduct post-exercise debriefs, complete post-exercise reviews and update business continuity strategies and plans as required 7.5 Manage and record staff learning and development on the business continuity management framework in accordance with organisational requirements, and framework policies and procedures 7.6 Report on the outcomes of staff learning and development, and business continuity framework exercises 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1	• Interprets organisation's reports, policies and procedures to develop business continuity management

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		plan/s
Writing	2.4, 4.1, 5.3, 6.3, 7.2-7.4, 7.6	• Develops detailed workplace documentation clarifying complex ideas using relevant language and structure according to context and audience
Oral Communication	4.2, 5.1, 7.2-7.4, 7.6	• Uses clear language, appropriate tone and syntax to address key personnel and disseminate information • Uses active listening, observational and questioning techniques to identify different perspectives and confirm, clarify or revise understanding • Informs staff about processes and outcomes of business continuity management plans and outcomes of staff learning and development and other reviews
Numeracy	2.1, 2.4, 7.3	• Analyses and interprets numerical information to assist in undertaking detailed business impact assessment activities across the spectrum of the organisation's stakeholders
Navigate the world of work	1.1, 2.1, 5.2, 5.4, 6.2, 7.3, 7.5	• Monitors adherence to wide-ranging organisational policies and procedures • Is highly autonomous, taking responsibility and ownership for most or all aspects of own work, intuitively recognising and managing factors that may affect achievement of outcomes
Interact with others	2.4, 3.2-3.4, 4.2, 4.3, 5.1, 7.1, 7.2, 7.6	• Intuitively 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
Get the work done	1.2, 1.3, 2.1-2.3, 3.1, 4.1, 4.4, 6.1-6.3, 7.3-7.6	• 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 • May use formal decision-making processes as scaffolding for thinking, seeking input, advice, feedback and specialist advice as required • 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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCON601 Develop and maintain business continuity plans	BSBCON601A Develop and maintain business continuity 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

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Assessment Requirements for BSBCON601 Develop and maintain business continuity 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 and implement a business continuity plan that includes appropriate links to emergency response, disaster recovery plans and detailed continuity and recovery strategies
- communicate effectively with relevant personnel to promote an understanding of business continuity frameworks.

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 relevant policies and procedures impacting business continuity, including business continuity strategies
- summarise the overall operations of the organisation, including existing data and information systems, paper and digital recordkeeping systems
- describe past and current internal, external and industry disruptions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – continuity field of work and include access to:

- business continuity documentation
- interaction with others
- case studies and, where possible, real situations.

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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

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BSBCON801 Establish and review the business continuity management framework and strategies

Modification History

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

Application

This unit describes skills and knowledge required to establish, monitor and review the formal and/or informal business continuity management framework and strategies for an organisation.

It 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.

The framework is important as it provides the processes and resources to ensure continued achievement of critical business objectives in the event of a disruption (even at diminished capacity) until full functionality is restored.

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

Unit Sector

Industry Capability – Continuity

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 business continuity management	1.1 Gain support for the business continuity management framework from relevant personnel

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ELEMENT	PERFORMANCE CRITERIA
framework	1.2 Demonstrate clear sponsorship, responsibility and accountability for business continuity management framework 1.3 In consultation with others, establish governance structures for business continuity management framework, in line with size of organisation 1.4 Determine and seek approval for resources required to implement business continuity management framework 1.5 Support relevant personnel to implement business continuity management framework 1.6 Establish a management system for organisation's business continuity management program 1.7 Seek management approval of organisation's business continuity management framework
2 Monitor business continuity management framework and strategies	2.1 Develop an appropriate cyclical review process for monitoring business continuity management framework 2.2 Provide relevant personnel with information relating to cyclical review process for business continuity management framework 2.3 Develop and seek approval of tools to verify and validate business continuity management framework activities, processes and plans, appropriate to the organisation 2.4 Consult with relevant personnel about the implementation of business continuity management framework 2.5 Monitor business continuity management framework learning, development and exercises across organisation
3 Review and evaluate business continuity management framework and strategies	3.1 Review and analyse reports on business continuity management framework learning and development exercises 3.2 Review and analyse the organisation's communication strategy and implement changes 3.3 Review and update the overall business continuity management framework activities, processes, plans and resources according to results pre- and post-activation 3.4 Analyse and integrate organisation's business impact assessment/s and identify dependencies and interdependencies if applicable 3.5 Implement and conduct business continuity management program audits

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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	3.1-3.4	• Interprets and analyses a vast range of textual information to review organisational agendas and policies
Writing	1.7, 2.2, 2.3	• Develops detailed workplace documentation clarifying complex ideas using relevant language and structure according to context and audience
Oral Communication	1.1, 1.3, 2.3, 2.4	• Uses clear language, appropriate tone and syntax to address key personnel and disseminate information • Uses active listening, observational and questioning techniques to identify different perspectives and confirm, clarify or revise understanding
Numeracy	1.4	• Analyses numerical information to determine budgetary requirements
Navigate the world of work	1.2, 3.2, 3.3	• Takes responsibility and ownership for most or all aspects of own work, intuitively recognising and managing factors that may affect achievement of outcomes • Recognises, understands and applies organisational requirements in undertaking own tasks and achieving expectations
Interact with others	1.1, 1.3-1.5, 1.7, 2.2, 2.4	• Pays close attention to the ways information is communicated, recognising ways they may influence interpretation of a message and appreciating the subtleties • Actively builds formal and informal networks to include key people with expert skills, knowledge, connections and decision-making power
Get the work done	1.6, 1.7, 2.1, 2.3, 2.5, 3.3-3.5	• Recognises the critical importance of clarifying, focusing and aligning goals and expectations to achieve outcomes • Uses formal decision making processes as scaffolding for thinking, seeking input, advice, feedback and specialist advice as required • Uses experience, analysis and intuition to decide whether an idea is worth developing and implementing

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCON801 Establish and review the business continuity management framework and strategies	BSBCON701A Establish and review the business continuity management framework and strategies	Updated to meet Standards for Training Packages Recoded to meet AQF 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

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Assessment Requirements for BSBCON801 Establish and review the business continuity management framework and strategies

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:

- consult with others to establish and implement a business continuity framework and system
- develop and implement a process to review a business continuity management framework in consultation with others
- analyse, evaluate and update a business continuity management framework
- demonstrate leadership and authority for embedding business continuity management into corporate and organisational levels of a business.

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 circumstances, barriers and/or interruptions that will disrupt, damage or inhibit the continuation of critical business functions and explain how these can be minimised
- describe the organisation’s current functionality, including existing data and information systems
- describe the organisation’s internal and external dependencies and interdependencies
- outline the organisation’s policies and procedures relevant to the business continuity management framework, including risk management strategy
- identify and describe past and current internal, external and industry disruptions
- explain the relationship of the business continuity management framework to other business processes.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – continuity field of work and include access to:

- risk management documentation
- interaction with others
- 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

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BSBCRT101 Apply critical thinking techniques

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 use fundamental critical thinking skills in work and life situations.

It applies to individuals who need the capacity to think critically, ask essential questions and consider answers to those questions.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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 Examine the value of curiosity and questioning	1.1 Investigate the value of curiosity and questioning in both work and life situations 1.2 Discuss how different types of questions and styles of questioning apply in diverse situations
2 Develop the habit of asking questions and wondering why	2.1 Reflect on and wonder about issues and situations 2.2 Ask questions of self to challenge and expand individual thinking 2.3 Ask questions of others in a constructive way to seek broader

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ELEMENT	PERFORMANCE CRITERIA
	knowledge and understanding 2.4 Identify situations when too much wondering and questioning may be inappropriate or ineffective 2.5 Assess the best ways to structure questions for different situations
3 Contribute to answers as well as questions	3.1 Take responsibility for answering questions as well as for asking them 3.2 From many possible questions, determine the key question to be answered 3.3 Identify and access information needed to answer the question 3.4 Sort the facts from other information in developing a response 3.5 Check own preconceptions and assumptions and determine their validity 3.6 Reach a considered conclusion or answer, without ruling out more questions or further exploration 3.7 Use conclusions and answers in positive, practical and timely ways

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	2.2, 2.3	• Uses questioning as a strategy to expand knowledge
Reading	3.3, 3.4	• Interprets key information from simple texts
Oral Communication	1.2, 2.3, 3.1, 3.7	• Uses listening and questioning techniques to obtain specific information and confirm understanding • Provides relevant information in response to questions
Interact with others	1.2, 2.3, 3.1, 3.7	• Uses accepted practices to discuss ideas with others
Get the work done	1.1, 2.1, 2.2, 2.4, 2.5, 3.2, 3.3, 3.4,	• Plans how information can be applied in timely and practical ways • Uses problem solving skills to formulate relevant

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	3.6, 3.7	questions and responses • Reflects on information to generate new ideas or questions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCRT101 Apply critical thinking techniques	BSBCRT101A Apply critical thinking techniques	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

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Assessment Requirements for BSBCRT101 Apply critical thinking techniques

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:

- explain the value of curiosity and questioning
- reflect on issues and situations
- ask questions of self and others to broaden own knowledge and understanding
- structure questions to suit different situations
- develop a considered response or conclusion to a particular question.

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:

- list different types of questions and their relevance to different situations
- explain situations where questioning may not be appropriate
- outline techniques to assist in forming the habit of asking questions and taking responsibility for answers
- describe typical blockers to the critical thinking process
- discuss the importance of critical thinking for businesses, the community and at an individual level.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to specific challenges and situations to demonstrate the application of critical thinking.

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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

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BSBCRT301 Develop and extend critical and creative thinking skills

Modification History

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

Application

This unit describes skills and knowledge required to develop the habit of thinking in a more creative way through looking at things differently, musing, testing, experimenting and challenging existing thought patterns.

It applies to individuals who need to develop and extend their critical and creative thinking skills to different issues and situations and have a range of problem solving, evaluation and analysis skills.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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 Develop a questioning mindset	1.1 Develop the habit of asking questions from different perspectives 1.2 Take responsibility for exploring a variety of information sources to provide relevant answers to own questions 1.3 Sort through information and ideas to identify the central questions, issues and challenges

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Challenge preconceptions and assumptions to determine actual constraints in defining a problem for resolution
2 Generate ideas and responses	2.1 Explore and use a range of creative thinking techniques to generate ideas and responses 2.2 Muse on, play around with and have fun with ideas in relation to a perceived objective 2.3 Identify and challenge blockers to creative thinking 2.4 Consider and explore realities beyond the current situation 2.5 Evaluate, and where appropriate, challenge existing boundaries to determine perceived or actual constraints 2.6 Show willingness to take risks with ideas and thought processes 2.7 Look around in familiar and unfamiliar places for new inspiration and habitually record observations, experiences, ideas and reflective thoughts to broaden personal knowledge base 2.8 Acknowledge and accept the opportunity for revelation when least expected 2.9 Identify connections and associations from things that seem unconnected
3 Challenge, test and re invent ideas	3.1 Identify, interrogate and challenge the assumptions behind ideas 3.2 Experiment with variations, and explore and challenge a range of different solutions and ideas 3.3 Consciously change perspectives, and evaluate ideas and situations in new ways 3.4 Where appropriate, involve others in ideas and how they might change or be improved
4 Enhance creative thinking skills	4.1 Consciously challenge and question own thought patterns and ways of responding to work and life situations 4.2 Identify and take opportunities to self-assess and to learn about new ideas and different ways of thinking 4.3 Take opportunities to practise and experiment with creative thinking techniques across work and life situations 4.4 Pro-actively talk to others about ways that new ideas and patterns of thinking can be encouraged and developed

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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	1.2, 2.7, 4.2	• Uses questioning as a strategy to expand knowledge • Reflects on existing thinking and current practices to generate new ideas
Reading	1.2, 1.3	• Comprehends textual information and integrates ideas and concepts from various sources
Writing	2.7	• Takes notes on observations, experiences and thoughts
Oral Communication	3.4, 4.4	• Participates in a verbal exchange of ideas and elicits the view and opinions of others by listening and questioning
Interact with others	3.4, 4.4	• Collaborates with others to test, strengthen and explore new ideas and different ways of thinking
Get the work done	1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.2, 4.2, 4.3	• Uses analytical techniques to identify issues and evaluate options • Contributes to the design of new approaches within the immediate work environment • Understands and applies some basic principles of analytical and lateral thinking to identify and select ideas

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCRT301 Develop and extend critical and creative thinking skills	BSBCRT301A Develop and extend critical and creative thinking skills	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBCRT301 Develop and extend critical and creative thinking skills

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:

- ask relevant questions to challenge and enhance creative thinking
- use various information sources to provide answers to own questions
- use a range of creative thinking techniques to generate ideas or responses to questions or issues
- record ideas in response to a predetermined issue or situation.

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 it is important to consider different perspectives when asking questions
- list and describe different creative thinking techniques
- describe common blockers to creative thinking,
- explain boundaries that need to be considered when generating ideas and responses
- describe ways of extending and developing individual creative thinking skills.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to specific challenges and situations to which creative thinking may be applied.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBCRT401 Articulate, present and debate ideas

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 articulate, present and debate ideas in a work or broader life context using creative techniques in order to provoke response, reaction and critical discussion.

This 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 using a degree of risk taking and storytelling.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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. Analyse ideas for communication to others	1.1 Distil key themes, messages and positions to aid in clarity of thought and presentation 1.2 Reflect on different ways of communicating ideas for different purposes and to different people 1.3 Identify the enabling skills and attributes of individuals who can effectively participate in discussions about ideas

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ELEMENT	PERFORMANCE CRITERIA
2. Provoke response and reaction	2.1 Explore and use different techniques to engage, fascinate and involve others in the process of communication and exchange 2.2 Explore the ways that storytelling can be used to communicate ideas 2.3 Create innovative approaches to different communication challenges 2.4 Be prepared to take risks in the way ideas are presented 2.5 Identify specific ways to provoke and encourage response in particular individuals or groups
3. Debate and discuss ideas	3.1 Present and argue substantiated positions on ideas 3.2 Be open to critical analysis of own ideas and to the ideas of others 3.3 Identify and participate in conversations that challenge and explore different concepts and approaches and generate new ideas 3.4 Respond to questions about ideas with confidence and relevant information 3.5 Reflect on and appraise the views of others, and use to refine ideas and to embrace new ideas

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	3.5	• Considers opinions of others to improve and enhance own learning
Oral Communication	2.1, 3.1, 3.2, 3.3, 3.4	• 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

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Interact with others	2.1, 2.2, 2.3	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.3, 3.5	• Recognises opportunities to develop and apply new ideas and select ideas for implementation • Considers key themes and ideas to be explored and identifies ways to respond to and use diverse perspectives • Uses features and functions of digital tools and technologies to store and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCRT401 Articulate, present and debate ideas	BSBCRT401A Articulate, present and debate ideas	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

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Assessment Requirements for BSBCRT401 Articulate, present and debate ideas

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:

- present ideas and information to a unfamiliar audience and environment that provoke interest and response
- reflect on and appraise the views of others
- participate actively and confidently in critical debate and discussion of ideas while responding to new and different communication situations
- investigate and evaluate creative and different ways of expressing and communicating ideas while making an opportunity pitch.

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 ways in which individuals receive and respond to ideas and information, and what influences their response
- identify the enabling skills and attributes of people needed to effectively discuss ideas
- describe the nature and role of risk taking in the presentation and debate of ideas
- explain the role of storytelling in communicating ideas and key storytelling techniques
- describe common techniques to tailor comments to particular audiences.

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 creativity and innovation – critical thinking field of work and include access to opportunities to present, discuss and debate ideas with others.

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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

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BSBCRT402 Collaborate in a creative process

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 collaborate in a creative process that is underpinned by a commitment to trust and ethics.

It applies to individuals who are involved in what is traditionally considered a creative endeavour but is also very important in broader business and community activities where creative team effort is highly valued.

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

Unit Sector

Creativity and Innovation – Creative Process

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 Enter into a collaborative creative process	1.1 Adopt a personal philosophy of trustworthy and ethical behaviour 1.2 Maximise the possibilities of sustaining creative partnerships through trustworthy and ethical behaviour 1.3 Use professional discretion and judgement in dealing with others 1.4 Acknowledge and respect the different ways that different

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ELEMENT	PERFORMANCE CRITERIA
	people may contribute to the creative process 1.5 Acknowledge and work within the legal framework that applies to creative content as part of individual commitment to an ethical approach 1.6 Respect collaborative efforts by relinquishing individual ownership of ideas
2 Engage in a collaborative creative process	2.1 Maintain a belief in personal ideas, combined with a willingness to move on as ideas are discarded and others evolve 2.2 Be prepared to let go of own vanity and ego to allow new ideas to emerge 2.3 Use language and adopt a demeanour that demonstrates respect and trust for others 2.4 Listen to, value, respect and trust the contributions of others as material to work with rather than positions to argue against 2.5 Challenge, test and share ideas in a supportive way as part of the creative process 2.6 Move on from initial positions and preconceptions to accept and embrace new and unpredictable ideas as they emerge during the creative process 2.7 Play a role that encourages the movement and shift of ideas within the group towards a well-conceived solution
3 Reflect on own role in the collaborative creative process	3.1 Reflect on own level of participation, relationships with others and personal behaviour in the collaborative process 3.2 Identify ways to do better next time and follow up on any issues that need to be resolved 3.3 Identify and seek opportunities to refine and expand own skills and knowledge, including learning from failing

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	3.2, 3.3	• Reflects on own performance and seeks opportunities

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		to improve own skills and knowledge
Writing	3.2, 3.3	• Notes comments, suggestions and ideas for own use
Oral Communication	2.3, 2.4, 2.5, 2.6, 2.7	• Presents ideas clearly using language and features suitable to diverse audiences • Uses listening and questioning techniques to elicit the views and opinions or others and to confirm understanding
Navigate the world of work	1.1, 1.5	• Understands own legal and ethical responsibilities with specific reference to personal responsibilities in a creative context
Interact with others	1.1, 1.2, 1.3, 1.4, 1.6, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1-3.3	• Actively identifies the requirements of important communication exchanges, selecting appropriate channel, format, tone and content to suit purpose and audience • Reflects on personal values, behaviours and assumptions and considers how these might be perceived by others • 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
Get the work done	2.1, 2.5, 2.6, 2.7, 3.2	• Reflects on processes and outcomes and identifies some key principles that may be relevant in future situations • Contributes to creating a climate where people feel comfortable to suggest, explore, adapt and adopt new ideas as a regular part of work life • Uses problem-solving skills to evaluate and challenge ideas and move towards solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCRT402 Collaborate in a creative process	BSBCRT402A Collaborate in a creative process	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBCRT402 Collaborate in a creative process

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:

- make a positive contribution to a collaborative creative process that generates, expands and develops ideas into a well-conceived solution
- reflect on and evaluate own role in the collaborative process
- identify and act on ways to enhance own ability to contribute effectively to a collaborative creative process.

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 the legal framework that applies to the creative process
- describe the concepts of trust and ethical behaviour in the context of creative endeavour
- identify different roles people may play in a collaborative creative process and how these roles contribute to the overall effort
- describe how the potential for creativity can be maximised within a team
- explain barriers to creativity in a group environment.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to a team of people in a collaborative creative process.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBCRT403 Explore the history and social impact of creativity

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 explore the history and social impact of creativity.

It applies to individuals who develop and apply a broad knowledge of the history of creativity. Understanding the concept of creativity, how creative people think and how creativity has been applied throughout history can provide individuals with inspiration and ideas to take into their own work and lives.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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 Investigate the history of creativity	1.1 Identify relevant sources of information on the history of creativity 1.2 Investigate and review different definitions of creativity and how these relate in an historical context 1.3 Assess the ways that individuals and collaborative groups have demonstrated creativity 1.4 Explore the relationship between creativity and different

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ELEMENT	PERFORMANCE CRITERIA
	cultures and relate these to current contexts
2 Assess the impacts of creativity	2.1 Explore the impacts of creativity on the ways that people live and work 2.2 Explore the ways in which creativity has occurred in different fields of human endeavour 2.3 Determine and evaluate the factors that affect the presence or extent of creativity in a given situation
3 Evaluate the potential for enhancing creativity in own life	3.1 Extract key information and ideas from the history of creativity for possible relevance to own life and work 3.2 Discuss and explore ideas with others 3.3 Reflect on how creativity or creative thinking might be integrated into own life and work 3.4 Identify and access opportunities to build own creative thinking skills

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	3.4	• Seeks opportunities to improve own skills and knowledge
Reading	1.1-1.4, 2.1-2.3, 3.1	• Interprets, evaluates and extracts relevant information from a range of texts
Writing	1.1-1.4, 2.1-2.3, 3.1	• Documents key research findings and ideas
Oral Communication	3.2	• Presents ideas clearly using language and features suitable to diverse audiences • Uses listening and questioning techniques to elicit the views and opinions or others
Get the work done	1.1, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2, 3.4	• Uses digital technologies to access information • Seeks and nurtures new ideas by making links between history and the present

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCRT403 Explore the history and social impact of creativity	BSBCRT403A Explore the history and social impact of creativity	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

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Assessment Requirements for BSBCRT403 Explore the history and social impact of creativity

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:

- conduct at least ONE research project into the historical and social impact of creativity that includes:
  - using a range of information sources
  - presenting findings and encourage discussion and debate, respecting different perspectives and ideas
  - identifying and accessing ways to build own creative thinking skills.

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 impact of creativity at different points in history, including contemporary perspectives
- explain the potential links between the history of creativity and current individuals and communities
- identify sources of information on the history and social impact of creativity
- outline different factors that impact on creativity.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to sources of information on the history of creativity.

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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

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BSBCRT501 Originate and develop concepts

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 originate and develop concepts for products, programs, processes or services to an operational level.

It applies to individuals who develop concepts for any business or community activity or process, such as marketing and advertising campaigns, staff development programs, information technology and communication systems, radio and television programs, entertainment events, films, exhibitions and digital media products. Individuals operate with a high degree of autonomy, but collaborate with others to generate ideas and refine concepts to the point where they can be implemented.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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 Evaluate and explore needs and opportunities	1.1 Research and evaluate existing information that informs new concept development 1.2 Where appropriate, identify and use gaps in current range of products, programs, processes or services as the catalyst for generating new ideas or concepts

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Expand the potential of new ideas through exploration of opportunities beyond the obvious 1.4 Identify factors that could have an impact on ideas or concepts to be developed, including potential for commercialisation 1.5 Determine whether other players are filling identified gaps or investigating similar opportunities 1.6 Develop preliminary ideas on innovative and different ways to address needs and opportunities 1.7 In consultation with relevant stakeholders, agree on broad parameters for developing ideas and concepts to meet market requirements
2 Develop a range of creative approaches	2.1 Use a range of creative thinking techniques to generate innovative and creative concepts to address identified needs 2.2 Challenge, test and experiment with different concepts and ideas as part of a collaborative process 2.3 Evaluate concepts in terms of their suitability for the target audience or purpose, their feasibility and their commercial potential 2.4 Take account of social, ethical and environmental issues as concepts and ideas are generated and discussed 2.5 Identify resources required to achieve desired creative and innovative outcomes 2.6 Evaluate the effectiveness of different strategies for achieving desired outcomes 2.7 Select concepts or approaches that achieve required outcomes in an innovative and feasible way 2.8 Present proposed concepts or approaches in an appropriate format
3 Refine concepts	3.1 Ensure concept development process is open to ongoing refinement and testing 3.2 Seek input and feedback on concepts from relevant stakeholders 3.3 Seek specialist advice on creative and technical aspects of proposals as required 3.4 Compare concepts with best practice examples of similar products, programs, processes or services 3.5 Use a range of creative and practical criteria to determine the

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ELEMENT	PERFORMANCE CRITERIA
	advantages and disadvantages of different concepts 3.6 Evaluate constraints on the realisation of concepts or ideas 3.7 Refine proposals based on analysis and feedback
4 Develop concepts to an operational level	4.1 Use refined concepts as the basis for developing detailed implementation specifications 4.2 Present specifications to relevant parties for approval, funding or endorsement 4.3 Reflect on methodology used to generate concepts and ideas and note ways of improving this in the future

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	3.1, 3.7, 4.3	• Reflects and evaluates methods used to develop concepts and seeks ways to improve • Actively elicits the views and opinions of others to develop and refine ideas
Reading	1.1-1.5, 2.3, 2.6, 3.4, 3.5, 3.6, 3.7, 4.1	• Interprets and evaluates a range of complex information and considers how to develop and adopt ideas to deliver products or services at an operational level
Writing	1.1-1.4, 1.6, 2.4-2.6, 2.8, 3.2-3.7, 4.1, 4.2	• Documents findings and ideas using language and structure to suit the purpose • Develops documents designed to gain feedback from others • Prepares proposals and plans for relevant stakeholders incorporating appropriate vocabulary and grammatical structures
Oral Communication	1.7, 2.2, 2.4, 3.2, 3.3, 4.2	• 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
Interact with	1.7, 2.2, 2.4, 2.8,	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group

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others	3.2, 3.3, 4.2	interaction and influencing direction • Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information
Get the work done	1.1- 1.5, 2.1-2.7 , 3.1, 3.4-3.6, 4.2, 4.3	• Plans and implements complex activities with multiple considerations, monitors implementation, and manages relevant feedback • Uses systematic, analytical processes in complex, non-routine situations to gather required information, identify and evaluate possible concepts, and select the most appropriate concept for development • Develops new and innovative ideas through exploration, analysis and critical thinking • Monitors outcomes, 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**
BSBCRT501 Originate and develop concepts	BSBCRT501A Originate and develop concepts	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

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Assessment Requirements for BSBCRT501 Originate and develop concepts

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:

- generate concepts and ideas that provide innovative solutions to identified issues
- evaluate and test concepts and ideas
- present ideas and information to others and reflect on responses
- develop at least two concepts, substantiated and supported with sufficient information to allow implementation to occur.

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 broad context in which concepts are being developed
- outline cultural, social and environmental issues and impacts to be considered in developing new concepts
- identify issues and requirements to commercialise the concept
- outline practical and operational issues to be considered in a specific work or community context
- describe the range of broad practical and operational issues that determine whether a concept can be implemented
- identify techniques for generating creative ideas and solutions, and for translating these ideas into workable concepts.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to:

- a full range of 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 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

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BSBCRT601 Research and apply concepts and theories of creativity

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 in-depth and broad research into different concepts and theories of creativity, and to apply those to a particular field of endeavour.

It applies to individuals who use sophisticated research and critical analysis skills in the exploration of creativity and its application to work and life practice. This research may be related to traditionally creative fields of practice, such as the arts, but may equally relate to broader fields of activity.

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

Unit Sector

Creativity and Innovation – Creative Thinking

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 Research concepts and theories of creativity	1.1 Use a range of research techniques to source information about creativity 1.2 Identify and explore potential new, emerging and alternative sources of ideas and thinking about creativity 1.3 Expand own knowledge and understanding of creativity

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ELEMENT	PERFORMANCE CRITERIA
	through review and critical analysis of information 1.4 Analyse, compare and contrast a range of theoretical perspectives and thinking on creativity 1.5 Identify and explore the transmigration of creative thought to innovative output
2 Apply theories of creativity to practice	2.1 Evaluate the relevance and application of different theories and practices of creativity based on analysis of own work and life experience 2.2 Analyse the ways in which different aspects of history, theory and other influences are applied, adapted or challenged in practice 2.3 Assess the ways in which theories, thinking and practices about creativity may be applied that provide benefits to individuals, businesses and the community
3 Develop, articulate and debate own perspectives theories and practices of creativity	3.1 Take a critical approach to different theories and reflect on own ideas and responses 3.2 Develop own substantiated positions in response to research and analysis 3.3 Articulate own positions in a manner which demonstrates clarity of thought and conceptual understanding of different theories and thinking 3.4 Debate own positions on creativity showing belief in own ideas and a willingness to remain open to new perspectives

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	1.1-1.5, 2.1- 2.3, 3.2, 3.3	• Analyses and evaluates a range of complex historical and theoretical information and considers how to adopt and challenge ideas and influences in own creative processes
Writing	1.1-1.5, 2.1- 2.3, 3.1- 3.3	• Prepares concise notes to help synthesise information sourced during research • Documents findings and substantiates own opinions

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		using relevant language, tone and structure
Oral communication	3.3, 3.4	• Expresses thoughtful and challenging opinions using engaging language, appropriate tone and syntax • Elicits views and information from others using active listening and provocative questioning techniques
Interact with others	3.3, 3.4	• Uses communication to achieve its purpose, demonstrating a sophisticated understanding of how to get ideas across to others • Shares knowledge and information freely as an integral part of work relationships whilst keeping an open mind to other points of view
Get the work done	1.2, 1.4, 1.5, 2.1-2.3, 3.1	• Systematically gathers and analyses relevant information to inform the development of concepts and ideas • Develops new and innovative ideas through exploration, analysis and critical thinking • Facilitates a climate in which creativity and innovation are accepted as an integral part of the way things are done

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCRT601 Research and apply concepts and theories of creativity	BSBCRT601A Research and apply concepts and theories of creativity	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

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Assessment Requirements for BSBCRT601 Research and apply concepts and theories of creativity

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:

- conduct at least one research project into past, current and emerging theories of creativity
- develop and discuss substantiated positions on creativity and its application in response to own analysis and research.

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 theories and concepts of creativity, including different historical perspectives and current and emerging thinking
- explain how different theories and thinking on creativity can be applied in different social and work contexts.
- outline potential and actual benefits of creativity for individuals, businesses and communities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation – critical thinking field of work and include access to current and emerging sources of information and thinking on creativity.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBCUE203 Conduct customer engagement

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 respond effectively to customer engagement while complying with requirements and using a variety of communication methods.

It applies to individuals 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

Stakeholder Relations – Customer Engagement

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 Prepare for customer engagement	1.1 Obtain and study product or service details relating to customer engagement 1.2 Study prepared engagement guides or scripts 1.3 Locate sources of information that may be required to develop product and service expertise 1.4 Develop an understanding of enterprise policies and procedures and personal targets or key performance indicators

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ELEMENT	PERFORMANCE CRITERIA
	(KPIs) 1.5 Develop proficiency with equipment and systems to effectively and efficiently manage engagement 1.6 Clarify details as required with relevant personnel
2 Provide quality service in response to customer queries	2.1 Use technology to respond to customer queries 2.2 Greet customer according to enterprise protocol and encompass cultural diversity 2.3 Establish and clarify customer needs 2.4 Satisfy customer needs promptly, efficiently and effectively to maximise customer satisfaction and minimise delays and need to refer customer elsewhere 2.5 Respond to customer concerns in a positive manner and in line with enterprise policy for complaint resolution 2.6 Treat customer with respect and courtesy, and enhance and develop customer loyalty 2.7 Complete follow-up action according to engagement escalation policy, timeframes, business rules and practices, and in line with customer expectations
3 Arrange provision of product or service	3.1 Respond appropriately to customer requirements and identify relevant options 3.2 Select appropriate product or service in consultation with customer 3.3 Agree actions or orders with customer giving consideration to maximising value and service delivery to customer 3.4 Consider customer retention options that can be applied to engagement 3.5 Use clear, simple and easy to understand language and ensure responses are comprehensive
4 Respond to customer enquiries	4.1 Adapt to the requirements and expectations of various customers when working in an outsource environment and dealing with multiple customer bases 4.2 Escalate enquiries or orders that cannot be satisfied immediately 4.3 Supply follow-up information to customer as required and in a timely manner 4.4 Observe organisational regulations and standards throughout transaction

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ELEMENT	PERFORMANCE CRITERIA
	4.5 Record details of engagement according to policy 4.6 Record and report difficulties not escalated but that may present an opportunity 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	Performance Criteria	Description
Reading	1.1-1.4, 3.1, 4.4	• Identifies and evaluates a range of texts to determine product information, performance standards and guidelines, and business requirements
Writing	3.5, 4.2-4.6	• Prepares clear and specific information which conveys an understanding of service requirements, outcomes and alternatives for customers and workplace personnel
Oral Communication	1.6, 2.2-2.6, 3.1, 3.2 3.4, 3.5, 4.3	• Articulates clearly, using industry-specific language suitable to audience to convey requirements and listening and questioning techniques to confirm understanding
Navigate the world of work	1.4, 2.5, 2.7, 4.2 4.4	• Recognises organisational expectations and follows explicit protocols and procedures, regulations and standards in performance of job role
Interact with others	2.2, 2.3, 2.5, 2.6 3.3, 4.1, 4.3	• 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
Get the work done	1.1-1.6, 2.1, 2.4, 2.7, 3.1, 3.2, 3.4 4.3, 4.6	• 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 • Identifies difficulties that might present continuous improvement opportunities • Understands purposes, specific functions and key features of common digital systems and tools and

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		operates them effectively to manage customer communication

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE203 Conduct customer engagement	BSBCCO203A Conduct customer engagement	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE203 Conduct customer engagement

Modification History

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

Performance Evidence

Evidence of the ability to:

- provide customer services to organisation's standards and guidelines
- use communication equipment and systems efficiently and effectively
- adapt communication techniques to suit customer profile and 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:

- describe operational environment – customer base, company products and services
- describe organisational performance standards and customer service expectations
- identify organisational policies, procedures, protocols and communication channels
- outline principles of customer service
- outline operation of equipment and systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information technology and telecommunications equipment
- workplace information and data
- performance management records and data and quality assurance guidelines
- call/engagement guides.

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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

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BSBCUE204 Collect data

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 collect primary data for market research and opinion poll research activities by telephone or similar means within organisational guidelines.

It applies to individuals 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

Stakeholder Relations – Customer Engagement

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 Prepare for data collection	1.1 Study and clarify survey questions and engagement guide 1.2 Discuss operational boundaries and fulfilment processes with relevant personnel 1.3 Develop an understanding of relevant legislation, codes, regulations and standards that apply to engagement 1.4 Develop proficiency using the technology in place

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Identify source of engagement targets 1.6 Review and develop a clear understanding of the engagement strategy
2 Conduct data collection	2.1 Make engagements in most efficient manner possible, following engagement guide within operational boundaries 2.2 Establish customer availability and willingness to participate in research 2.3 Inform customer of survey details, purpose and approximate time survey will take 2.4 Record customer responses 2.5 Answer customer queries or refer or escalate appropriately 2.6 Observe relevant codes and regulations throughout engagement
3 Record results	3.1 Record outcomes and present results according to policy 3.2 Record, report and action difficulties encountered according to policy 3.3 Assess and analyse performance against agreed targets 3.4 Amend database where applicable

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, 1.6	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Writing	2.1, 2.2, 2.4, 3.1, 3.2, 3.4	• Uses clear, specific and industry-related terminology to complete and update workplace documentation
Oral Communication	1.1, 1.2, 2.1-2.3, 2.5	• Articulates requirements clearly using specific and relevant language suitable to audience • Uses appropriate tone, pace, and listening and questioning techniques to confirm understanding
Navigate the	1.3, 2.1, 2.6, 3.2	• Recognises organisational expectations and follows

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world of work		explicit protocols and procedures • Complies with legal and regulatory requirements in data collection tasks
Interact with others	2.1-2.3, 2.5, 2.6	• Follows instructions regarding what and how to communicate, following predetermined script
Get the work done	1.4-1.6, 2.1, 2.2, 2.4-2.6, 3.3, 3.4	• Plans and implements routine data-collection tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding sequencing, timing and need to refer to higher authority as required • Analyses performance to decide if targets are being met • Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete data collection tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE204 Collect data	BSBCCO204A Collect data	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE204 Collect data

Modification History

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

Performance Evidence

Evidence of the ability to:

- use prepared scripts and guides to engage customers and collect data in compliance with organisational policy, industry codes and standards, and regulatory and legal requirements
- use digital systems and tools effectively and efficiently to record data and maintain databases
- present results and analyse performance against established targets.

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 data-collection techniques
- identify enterprise policies, procedures and guidelines for customer engagement and data collection
- identify relevant legal and regulatory requirements for data collection
- identify relevant standards for data collection
- explain operational systems and technology employed in data collection.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information and telecommunications equipment
- workplace information and data
- relevant standards and guidelines
- performance management and quality assurance documentation and records

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- call/engagement guides.

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

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BSBCUE205 Prepare for work in a customer engagement 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 participate in customer engagement operations, including defining the requirements and expectations of the organisation.

It applies to individuals who perform a range of mainly routine tasks, using limited practical skills and fundamental operational knowledge, working under direct supervision.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Relate own role to customer engagement operations	1.1 Identify specific customer engagement operations and relate these to the industry-wide context 1.2 Identify how customer contact activity contributes to the organisation’s goals 1.3 Identify personal customer engagement role and operations 1.4 Identify personal performance requirements and expectations

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ELEMENT	PERFORMANCE CRITERIA
	in relation to organisation's customer contact objectives 1.5 Identify the major components of the customer engagement infrastructure 1.6 Relate personal operations to customer engagement infrastructure
2 Reflect on personal performance	2.1 Recognise and use available resources and support effectively 2.2 Operate within reporting protocols, policies and procedures of customer contact organisational structure 2.3 Comply with regulatory and legislative requirements 2.4 Identify personal performance requirements and expectations
3 Maintain a professional approach to employment	3.1 Display a positive and ethical approach to employment and role 3.2 Identify realistic short- and long-term career objectives 3.3 Relate personal capabilities to current role and career objectives 3.4 Identify strategies for projecting a professional image in current role 3.5 Contribute to the promotion of the centre, organisation and its staff to customers
4 Participate in a workplace team	4.1 Identify team member roles and team structure 4.2 Interact cooperatively with team members

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, 4.1	• Identifies relevant information sources to determine key and relevant workplace information
Oral Communication	4.1, 4.2	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding

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Navigate the world of work	1.1-1.6, 2.1-2.4, 3.1-3.3, 4.1	• Takes steps to develop skills and personal efficacy in work role, with organisational support • Identifies skills used in current role and how they may assist achievement of longer term goals • Understands nature and purpose of own role and associated responsibilities, where it fits into the organisational structure and how it contributes to organisational goals and outcomes • Recognises organisational expectations and follows explicit protocols and procedures, and legal and regulatory requirements
Interact with others	2.1, 4.2	• Establishes connections with team members, using some accepted practices for building rapport • Seeks to cooperate with others to achieve results in immediate context
Get the work done	1.1, 1.5, 3.4, 3.5 4.1	• Completes routine tasks with familiar goals and outcomes • Analyses attitudes and presentation associated with professional performance in a team

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE205 Prepare for work in a customer engagement environment	BSBCCO205A Prepare for work in a customer contact environment	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE205 Prepare for work in a customer engagement environment

Modification History

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

Performance Evidence

Evidence of the ability to:

- establish key requirements of customer engagement roles and undertake preparation for a specific role
- perform a customer engagement role to organisational standards and expectations in cooperation with team 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:

- identify customer base, company products and services
- explain standards of conduct required in a customer engagement environment
- outline industry-specific regulatory and legislative requirements
- outline operational systems used within scope of role
- identify organisational mission, business goals and standards
- explain scope of customer engagement operations
- explain own specific work role and key relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- relevant information, such as organisational policies, standard operating procedures, performance management guidelines, role position descriptions, organisational charts
- peer and line manager feedback within an engagement centre environment.

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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

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BSBCUE301 Use multiple information 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 use multiple information systems to research information and records, and to maintain up-to-date customer information.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Access a range of information systems	1.1 Efficiently logon to information systems 1.2 Navigate screens efficiently to locate displays and information relevant to role 1.3 Use a database management system (DBMS) to control data access, enforce data integrity, manage concurrency, and access information 1.4 Manage use of information systems efficiently according to

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements
2 Process customer information using multiple information systems	2.1 Analyse customer enquiry to identify information needs 2.2 Identify information systems required to satisfy information needs 2.3 Use information systems according to organisational processes to complete customer enquiry or transaction 2.4 Record customer information in information systems to complete customer enquiry or transaction 2.5 Use the shortest reasonable pathways to navigate between and within information systems 2.6 Maintain contact and communication with customer while operating information systems 2.7 Verify information with customer to complete transaction
3 Identify and rectify information system and processing errors	3.1 Identify errors in information system, relevant to role 3.2 Analyse errors for impact on information system and customers 3.3 Identify source of errors, where possible 3.4 Consult with stakeholders to identify actions to rectify errors 3.5 Arrange rectification and confirm amendments are accurate 3.6 Inform customers of errors and take necessary action 3.7 Identify information system faults and notify relevant personnel according to policy 3.8 Recommend procedural change according to policy

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, 3.5	• Recognises and interprets information to determine and confirm customer requirements
Writing	2.4, 3.7	• Records information accurately using clear language and appropriate terminology

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Oral Communication	2.1, 2.6, 2.7, 3.4-3.6	• Articulates requirements clearly using specific and relevant language suitable to audience • Uses appropriate tone, pace and listening and questioning to elicit information and confirm understanding
Navigate the world of work	1.4, 2.3, 3.7, 3.8	• Recognises and follows explicit organisational policies and procedures when using information systems, notifying faults and making recommendations for change
Interact with others	2.6, 2.7, 3.4, 3.6, 3.7	• Identifies and follows accepted communication practices and protocols when collecting, providing and verifying information in a service context or in consultation with colleagues and stakeholders
Get the work done	1.1-1.3, 2.1, 2.2, 2.5, 3.1-3.3, 3.5, 3.7	• Selects from a range of predetermined options in routine customer inquiry situations, identifying and taking some situational factors into account • Recognises and takes responsibility for identifying and addressing information system errors and their sources • Uses familiar digital systems and tools to access, organise, analyse, display and amend information • Recognises some general design and operating principles of digital tools and uses these when troubleshooting

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE301 Use multiple information systems	BSBCCO301B Use multiple information systems	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUE301 Use multiple information systems

Modification History

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

Performance Evidence

Evidence of the ability to:

- access, use and manage information systems to organisational requirements
- navigate systems to locate information required to complete customer inquiry or transaction
- identify and rectify information system and processing errors to established procedures and policies
- provide service to customers in accordance with organisational and regulatory 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 computer and system troubleshooting principles
- identify enterprise business systems and operating platforms relevant to role
- identify enterprise policies, procedures and guidelines regarding use and security of information systems
- explain operation of social networking websites
- explain escalation process for reporting information technology issues.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- relevant standards and guidelines for use of systems

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- workplace information and data
- quality assurance and system user error reports
- troubleshooting and escalation reports
- a work environment to observe operation of systems.

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

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BSBCUE302 Deploy customer service field 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 deploy field staff to fulfil service commitments to customers and meet organisational requirements.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Create a despatch job for automatic despatch	1.1 Identify the need to create a job despatch order 1.2 Determine impact of this on resources, and its urgency, in consultation with appropriate areas, business protocols, regulatory and legislative requirements 1.3 Enter necessary details into appropriate work management system to create and automatically despatch job 1.4 Confirm automatic despatch, where necessary

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ELEMENT	PERFORMANCE CRITERIA
2 Manually despatch and clear jobs	2.1 Identify need to manually despatch a job 2.2 Communicate job details clearly to field staff 2.3 Enter job details into appropriate work management system
3 Redeploy field staff	3.1 Identify need to redeploy resources according to agreed priority 3.2 Liaise with relevant stakeholders and team members 3.3 Deliver job to field staff in a timely manner 3.4 Maintain accurate records relating to resources and their deployment
4 Create and send communication to field staff	4.1 Identify need for communication to relevant customers 4.2 Create clear and concise communication according to business protocols 4.3 Check information for clarity and accuracy 4.4 Obtain appropriate approvals before sending communication 4.5 Coordinate and monitor responses to communications

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	4.3, 4.5	• Recognises and interprets information from relevant sources to determine customer and organisational requirements
Writing	1.3, 2.2, 2.3, 3.4, 4.2, 4.3	• Documents instructions and other information in required formats employing clear, concise language and appropriate terminology, and checks details for accuracy
Oral Communication	1.2, 1.4, 2.2, 3.2	• Articulates clearly using specific and relevant language suitable to audience to convey requirements and uses listening and questioning techniques to confirm understanding
Numeracy	1.1, 1.3, 2.3, 3.4, 4.3	• Interprets numerical information and applies basic

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		mathematical calculations relating to scheduling
Navigate the world of work	1.2, 4.2, 4.3	• Takes personal responsibility for adherence to legal and regulatory requirements and workplace reporting systems • Recognises and follows explicit and implicit business protocols within work role
Interact with others	3.2, 3.3, 4.2-4.5	• Understands what to communicate, with whom and how, and selects appropriate form, channel and mode of communication in exchanges with field staff • Maintains communication with field staff about specific activities requiring joint responsibility and accountability
Get the work done	1.1-1.4, 2.1, 2.3, 3.1, 3.3, 4.1, 4.4, 4.5	• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency, and considering how to link with the work of field staff • Uses ICT-based systems and programs to assist with planning, implementing and tracking service progress • Selects from a range of pre-determined options in routine situations, identifying and taking some situational factors into account when identifying requirements • Understands 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**
BSBCUE302 Deploy customer service field staff	BSBCCO302B Deploy customer service field staff	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUE302 Deploy customer service field 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:

- communicate with customers, field staff and management, in compliance with organisational protocols and service delivery priorities
- produce automatic and manual dispatch jobs using systems to enter, maintain and control job details
- identify need to redeploy field staff, coordinate required communications, and monitor responses.

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 legislative and regulatory requirements relevant to deployment of customer service field staff
- describe operational environment, including customer base, company products and services
- outline organisational policy, procedures, culture, values, mission, business goals and standards relevant to deploying customer service field staff
- describe work deployment systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- workplace information and data

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- a real or simulated workplace to discuss customer experience
- performance management and quality assurance documentation
- relevant legislation and regulatory codes.

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

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BSBCUE303 Conduct a telemarketing campaign

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 prepare, conduct and review a telemarketing campaign, which may involve both inbound and outbound calling.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgment and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Prepare for telemarketing campaign	1.1 Study and clarify campaign details with team members, and prepare engagement guides for telemarketing campaign 1.2 Learn features of product or service to be marketed 1.3 Discuss operational boundaries and targets with relevant personnel 1.4 Develop proficiency using relevant technology 1.5 Develop strategies to achieve sales targets

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Identify and develop a clear understanding of fulfilment processes 1.7 Ensure campaign and engagement guides meet relevant legislation, codes, regulations and standards
2 Conduct planned telemarketing activity	2.1 Make customer engagement in most efficient manner possible 2.2 Conduct engagement according to engagement guide, and enterprise policies and procedures 2.3 Answer customer queries with professional responses, using active listening 2.4 Explain features and benefits of products or services to customers, where appropriate 2.5 Improvise on engagement guide content to suit customer needs 2.6 Identify positive sales responses from customers and develop them into sales opportunities 2.7 Close sales efficiently 2.8 Escalate customer queries that cannot be satisfied, according to enterprise policy
3 Manage negative customer responses	3.1 Counter negative customer responses to product, service or organisation with positive features and benefits 3.2 Respond politely to personal or irrelevant negative customer responses 3.3 Identify limits of the organisation’s tolerance to negatively responding customers and end negative customer engagement accordingly 3.4 Escalate negative customer responses appropriately 3.5 Develop strategies to recover from negative customer responses and remain positive for next engagement
4 Complete sales	4.1 Record details of sale according to procedures 4.2 Discuss and agree payment arrangements with customer and action according to organisational policy 4.3 Advise customer of payment procedures 4.4 Record and verify credit card details with customer where appropriate and according to organisational protocols 4.5 Discuss and agree delivery arrangements with customer and record and action, where applicable 4.6 Activate fulfilment processes necessary to complete sale

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ELEMENT	PERFORMANCE CRITERIA
	4.7 Apply privacy requirements during transactions
5 Record campaign results	5.1 Collate and present engagement records according to organisational policy 5.2 Record and report difficulties not escalated 5.3 Analyse performance against agreed targets to identify future improvements 5.4 Amend errors and omissions in databases

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, 1.6, 1.7	• Recognises and interprets information from relevant sources to determine product features, regulatory standards and organisational requirements
Writing	1.1, 1.7, 2.8, 4.1, 4.4, 4.5, 5.2, 5.4	• Develops instructions using appropriate register and vocabulary for use by telemarketers • Records details related to customer interaction and outcomes using concise expression and industry terminology • Records and amends sales data, identifies problems and specifies further action as required
Oral Communication	1.1, 1.3, 2.1-2.4, 2.6, 2.7, 3.1, 3.2, 4.2-4.5	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and uses listening and questioning to confirm understanding
Numeracy	1.1, 1.3, 4.2	• Interprets numerical information and applies basic mathematical calculations to analyse and validate data
Navigate the world of work	1.7, 2.2, 2.8, 4.2, 4.4, 4.7 5.1,	• Takes personal responsibility for adherence to legal/regulatory requirements, codes and standards, and organisational policies and procedures in planning and performing work role
Interact with others	1.1, 1.3, 2.1-2.8, 3.1-3.5	• Cooperates with others as part of shared work responsibilities and participates in discussions with team and supervisors to reach understanding and

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		agreement • Pays attention to needs and responses of customers, making adjustments to language, vocabulary, tone and style to achieve successful transactions or termination of negative interactions as required • Cooperates with others when escalating customer queries and responses • Identifies how to use interpersonal skills to maintain a positive attitude after negative experiences in work context
Get the work done	1.1-1.5, 1.7, 2.1-2.8, 3.4, 3.5, 4.6, 4.7, 5.3, 5.4	• Plans and implements tasks required for a telemarketing campaign, taking some limited responsibility for decisions regarding sales techniques and customer management to meet defined targets • Analyses and reviews performance results and identifies improvement opportunities • Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks, adapting some functions to improve personal efficiency

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE303 Conduct a telemarketing campaign	BSBCCO303B Conduct a telemarketing campaign	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE303 Conduct a telemarketing campaign

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:

- meet agreed engagement and sales ratios and achieve sales targets
- prepare and use an engagement guide effectively
- manage negative customer engagement in accordance with organisation procedures and standards
- record sales, payments and delivery arrangements accurately using systems technology
- summarise results against targets, report difficulties and improvement 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:

- identify legislative and regulatory codes and requirements relating to conducting a telemarketing campaign
- outline marketing principles and practice
- explain operational environment: customer base, company products and services
- identify organisational policies and protocols associated with customer service and sales
- explain sales techniques, fulfilment processes, and technology and systems employed.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- communication technology and database systems in real or simulated workplace
- workplace information and data, including:

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- call/engagement guides
- performance managements, sales performance and quality assurance documentation
- records and relevant legislation
- regulatory requirements
- organisational standards and guidelines.

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

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BSBCUE304 Provide sales solutions to customers

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 process sales enquiries requiring complex solutions, and to follow up to ensure customer satisfaction.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Identify customer needs	1.1 Question customers in detail and listen actively to determine product and service requirements 1.2 Verify and agree customer needs with customer 1.3 Access existing customer records and offer technical and specialist advice to customer, where such advice is considered beneficial to closing of the sale and customer understanding and decision-making

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify customer's financial limitations 1.5 Discuss estimates and quotes with team and specialist staff if necessary, prior to submission to customer
2 Respond to customer needs	2.1 Prepare, present and discuss estimates and quotes with customer, as role permits 2.2 Fully explain benefits of various options and pricing structures to customer 2.3 Give customer opportunity to question options and quotes provided 2.4 Promote advantages of dealing with the organisation 2.5 Manage customer objections effectively by promoting specific benefits
3 Close sales	3.1 Agree on product or service to be purchased with customer 3.2 Establish customer's preferred purchase and payment arrangements 3.3 Finalise documentation relating to sale and forward to customer for agreement and signature 3.4 Negotiate and arrange payment method with customer 3.5 Conduct appropriate credit checks 3.6 Clearly record delivery/installation arrangements as agreed with customer 3.7 Comply with relevant legislation, codes, regulations and standards during engagement and sale
4 Input sales records	4.1 Fully record details of sale 4.2 Amend existing customer records where appropriate 4.3 Initiate invoices according to organisational policy 4.4 Organise delivery/installation according to organisational policy
5 Provide sales support where required	5.1 Verify customer satisfaction after delivery/installation 5.2 Identify additional action to satisfy customer needs 5.3 Initiate action in an efficient and timely manner

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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	• Recognises and interprets textual information from relevant sources to determine customer requirements
Writing	3.3, 3.6, 4.1-4.3	• Prepares specific information, in formats required by organisation, to conduct and close sales
Oral Communication	1.1-1.3, 2.1-2.3, 3.1, 3.2, 3.4, 3.6, 5.1	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning to confirm understanding • Elicits views and opinions of others by listening and questioning
Numeracy	1.4, 2.1, 2.2, 3.4, 3.5	• Interprets numerical information and applies basic mathematical calculations relating to estimates and quotes • Extracts, evaluates and compares numerical information
Navigate the world of work	3.7, 4.4	• Takes personal responsibility for adherence to legal/regulatory requirements and organisational policy in planning and undertaking work
Interact with others	1.1-1.5, 2.1-2.5, 3.1, 3.2, 3.4, 5.1, 5.2	• Selects and uses appropriate conventions and protocols when communicating with customers and relevant authorities • Recognises importance of establishing rapport to engage customers and provide effective service solutions in complex situations
Get the work done	1.3, 2.1, 3.3, 3.5, 3.6, 4.1-4.4, 5.1-5.3	• Plans and implements customer sales tasks, accepting stated goals and aiming to achieve them efficiently • Uses systematic, analytical processes to gather relevant credit information • Recognises and takes responsibility for anticipating and addressing predictable problems to achieve customer satisfaction promptly • Uses familiar digital systems and tools to access, organise, analyse, record and display information relevant to customer sales activities

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE304 Provide sales solutions to customers	BSBCCO304C Provide sales solutions to customers	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE304 Provide sales solutions to customers

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:

- recommend product or service to match customer need with a clear explanation of price and payment options
- apply appropriate credit checks
- organise customer payment and delivery details
- record sales, payments and delivery arrangements
- provide after sales service.

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 estimate and quote procedures
- outline marketing and sales principles and practices
- identify organisational pricing policies
- identify organisational protocols associated with customer service and sales
- identify statutory, regulatory and legislative requirements related to providing sales solutions to customers.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- relevant standards, guidelines and legislation, workplace information and data
- relevant office resources and equipment

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- a work environment or simulated customer contact centre to observe interaction with customers.

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

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BSBCUE305 Process credit applications

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 handle credit applications or arrangements for customers with no credit rating or a poor credit rating, and negotiation of various outcomes with customers.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Review and evaluate credit application	1.1 Review application to determine customer details and amount of credit required 1.2 Check existing customer records for payment history and credit standing 1.3 Obtain customer credit rating according to credit management procedures

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Establish customer's credit rating and ability to repay credit advances
2 Process credit application	2.1 Approve or decline application according to organisational policy and relevant legislation, codes, regulations and standards 2.2 If declining, explain decision to the customer and discuss alternative arrangements as necessary 2.3 Advise customer of appeal rights where appeal provisions exist and apply
3 Negotiate credit application details	3.1 Negotiate and agree payment arrangements with customer where credit approval is granted 3.2 Escalate difficulties experienced in customer negotiations according to organisational policy
4 Complete administrative arrangements	4.1 Complete and forward appropriate documentation to customer 4.2 Organise credit arrangements and record details according to organisational policy and legislative requirements 4.3 Notify customer of payment arrangements according to organisational procedures 4.4 Regularly monitor and follow up customer commitments 4.5 Resolve outstanding issues relating to credit application in an efficient and timely manner

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	• Recognises and interprets textual information from relevant sources to determine customer requirements and position
Writing	2.1, 4.1-4.3	• Prepares specific information using different formats which conveys an understanding of outcomes and alternatives and uses terminology appropriate to intended audience
Oral	2.1-2.3, 3.1, 4.4	• Articulates clearly using specific and relevant

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Communication		language suitable to audience to convey requirements, and listening and questioning to confirm understanding
Numeracy	1.1, 1.2, 1.4, 2.1, 3.1, 4.2	• Interprets numerical information and applies basic mathematical calculations relating to current and future financial scenarios • Extracts, evaluates and compares numerical information
Navigate the world of work	1.3, 2.1, 3.2, 4.2, 4.3	• Appreciates implications of legislative and organisational requirements related to assessment and administration of credit applications
Interact with others	3.1, 3.2	• Selects and uses appropriate conventions and protocols in negotiations with customers
Get the work done	1.4, 4.1-4.5,	• Plans and implements credit application tasks, accepting stated goals and aiming to achieve them efficiently • Uses formal decision-making processes to establish credit rating and customer capacity to meet obligations • Monitors customer payments to identify and resolve familiar problems promptly • Uses familiar digital systems and tools to access, organise, analyse and display information relevant to credit administration

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE305 Process credit applications	BSBCCO305B Process credit applications	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUE305 Process credit applications

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 organisational credit procedures to determine customer capacity to pay
- discuss and explain non-approval to customers
- negotiate credit terms and payment arrangements with customers.

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 credit and debt-recovery principles and techniques
- identify financial delegations and limits applied, within organisation and specific to role
- identify legislative, regulatory and industry code requirements for credit approval processes
- identify organisational credit management policies and procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- organisational credit management policies and standard operating procedures
- relevant information on legislation, regulations, standards codes of practice
- workplace information and data.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBCUE306 Process complex 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 handle difficult engagements relating to customer billing and customer accounting, primarily where the customer is defaulting.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgment and relevant theoretical knowledge, and who 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

Stakeholder Relations – Customer Engagement

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 Receive and review a customer default enquiry or case	1.1 Receive and review customer enquiry to identify details of case 1.2 Obtain additional information to assist in resolving case 1.3 Review options to resolve case with other staff members, where appropriate 1.4 Obtain specialist and team member advice, and escalate where necessary 1.5 Consider eligibility for hardship program

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Observe relevant legislation, codes, regulations and standards 1.7 Develop initial advice to be given to customer
2 Negotiate payment with defaulting customers	2.1 Consult with customer on suggested course of action and options 2.2 Assess customer response to consultation 2.3 Develop realistic settlement options giving consideration to policy, customer response and payment history 2.4 Offer and agree on a payment option with customer according to organisational policy 2.5 Record revised payment options as agreed with customer and according to organisational procedures
3 Advise defaulting customers of cancellation	3.1 Advise defaulting customers of service or product cancellation 3.2 Negotiate successful product return with customer where appropriate 3.3 Explain debt-recovery process to customer 3.4 Initiate debt-recovery process
4 Manage default actions	4.1 Follow up payment, debt recovery or product return to ensure completion of case 4.2 Amend customer records according to organisational procedures 4.3 Follow organisational default and credit-management 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 Criteria	Description
Reading	1.1	• Recognises and interprets textual information from relevant sources to determine customer requirements and position
Writing	1.7, 2.5, 4.2	• Prepares specific information which conveys an understanding of alternatives and outcomes

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		• Records details and amends workplace documentation
Oral Communication	1.2-1.4, 2.1, 2.4, 3.1-3.3	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and uses listening and questioning to confirm understanding
Numeracy	1.1, 1.5, 2.4	• Interprets numerical information to determine financial position of customer • Uses basic calculation methods to determine payment amount and frequency
Navigate the world of work	1.6, 2.4, 2.5, 4.2, 4.3	• Takes personal responsibility for adherence to legislative and organisational requirements relevant to processing default accounts
Interact with others	1.3, 1.4, 2.1-2.4, 3.1-3.4	• Selects and uses appropriate conventions and protocols when discussing debt recovery and default matters with colleagues and customers • Assesses customer response to options and outcomes to avoid misunderstanding and negotiates mutual agreement
Get the work done	1.5, 1.7, 2.2, 2.3, 2.5, 3.4, 4.1, 4.3	• Organises workload logically and systematically to undertake clearly defined tasks of varying complexity in cooperation with colleagues and customers • Uses systematic, analytical processes to make decisions about customer default positions; setting goals, gathering relevant information, and identifying and evaluating options against criteria • Uses familiar digital systems and tools to access, organise, analyse and display information relevant to payment options and customer records

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE306 Process complex accounts	BSBCCO306B Process complex accounts	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUE306 Process complex 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:

- develop options for meeting customer default enquiries
- determine need for appropriate escalation if required
- consult with customer to negotiate practical solutions and agreement to payment arrangements
- implement an appropriate and timely debt-recovery process in compliance with relevant legislation, regulatory standards and organisational policy.

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 conflict resolution and negotiation techniques to facilitate effective resolution of customer service issues and general customer service protocols
- explain escalation processes
- outline legislative, regulatory and industry code requirements relating to account processing requirements
- explain organisational billing and credit procedures
- identify organisational financial delegations and authorisation limits
- identify product and service charges
- outline risk assessment and management principles.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- workplace information, reporting systems and data
- information on relevant legislation, regulations, codes of practice and standards
- information on organisational policies and standard operating procedures, financial delegations and authorisation limits
- case studies or actual workplace.

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

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BSBCUE307 Work effectively in customer engagement

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 customer engagement operations. It requires an understanding of organisational requirements, expectations, policies and procedures.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who may provide technical advice and support to a team. This work is undertaken with some supervision and guidance.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Identify requirements of customer engagement role	1.1 Identify specific customer engagement operations and relate these in industry-wide context 1.2 Identify role of customer engagement in relation to the organisation 1.3 Identify personal customer engagement role and operations 1.4 Relate personal operations to organisation’s customer

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ELEMENT	PERFORMANCE CRITERIA
	engagement objectives 1.5 Identify major components of customer engagement infrastructure 1.6 Relate personal operations to customer engagement infrastructure
2 Manage personal performance	2.1 Use available resources, systems and support effectively 2.2 Identify key performance indicators (KPIs) and comply with organisational processes and reporting protocols, policies and procedures 2.3 Comply with organisational, regulatory and legislative requirements 2.4 Identify personal performance requirements and expectations and adopt strategies to achieve them 2.5 Identify and participate in performance management and development processes
3 Maintain a professional approach to employment	3.1 Display a positive and ethical approach to employment and role 3.2 Identify realistic short- and long-term career objectives 3.3 Relate personal capabilities to current role and career objectives 3.4 Identify strategies for projecting a professional image in current role 3.5 Contribute to promotion of the organisation and its staff, to customers
4 Participate in a workplace team	4.1 Identify team member roles and team structure and interact cooperatively with team members 4.2 Recognise, acknowledge and contribute to formation and achievement of team objectives 4.3 Recognise and respond positively to conflict within team 4.4 Provide feedback to enhance team performance

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	2.2-2.5	• Identifies and evaluates texts of varying complexity to determine relevant legislative, regulatory and organisational requirements, and interprets performance management and development information
Oral Communication	2.5, 3.5, 4.2, 4.3	• Engages with others using clear articulation and appropriate language, tone and pace suitable to audience and environment • Exchanges information through listening and questioning
Navigate the world of work	1.1-1.6, 2.1-2.5, 3.1-3.5	• Understands nature and purpose of own role and associated responsibilities and how it contributes to organisational goals and outcomes, • Complies with explicit protocols, policies and procedures and legal and regulatory requirements relevant to own role and work context • Assesses skills used in current role and analyses how they may assist achievement of longer-term goals • Uses organisational support and development opportunities to increase skill range and improve performance
Interact with others	4.1-4.4	• Cooperates with team members and contributes to achievement of joint outcomes • Uses a range of strategies to build connections and rapport with team members including provision of feedback and taking a constructive approach to resolution of conflicts of opinion
Get the work done	2.1, 2.4, 3.4, 3.5 4.2-4.4	• Plans approach to work role and associated tasks and responsibilities accepting stated goals and aiming to achieve them efficiently • Analyses own attitudes and presentation and uses them to achieve professional performance in a team • Recognises value of conflict resolution and feedback to achieve continuous improvement within team and work context

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE307 Work effectively in customer engagement	BSBCCO307A Work effectively in customer contact	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE307 Work effectively in customer engagement

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:

- achieve identified KPIs in a customer engagement role in compliance with organisational processes, policies and procedures
- develop and maintain a professional approach to own role and responsibilities
- participate effectively in team-based operations, contributing to establishment of objectives and achievement of outcomes.

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 customer base, company products and services
- explain performance indicator requirements and performance management outcomes
- explain industry-specific regulatory and legislative requirements in relation to customer engagement
- outline operational systems used within scope of own role and scope of customer engagement operations and key relationships
- outline organisational mission and business goals.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

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- relevant information, such as organisational policies, standard operating procedures and guidelines, performance management guidelines, role position descriptions and organisational charts
- peer and line manager feedback in a contact centre environment to observe performance.

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

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BSBCUE308 Conduct outbound customer engagement

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 outbound engagements in relation to enquiries or sales of particular products and services to meet both customer and business needs.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgment and relevant theoretical knowledge, and who may provide technical advice and support to a team. This work is undertaken with some supervision and guidance.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Prepare for outbound engagement	1.1 Identify engagement details and apply a clear understanding of organisational policies and procedures 1.2 Obtain and study product and service details relating to customer engagement 1.3 Study prepared engagement guides or scripts 1.4 Locate sources of information that may be required to develop

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ELEMENT	PERFORMANCE CRITERIA
	product or service expertise, or discuss requirements with team 1.5 Develop proficiency with equipment and systems to effectively and efficiently manage engagement 1.6 Clarify details as required with relevant manager
2 Conduct outbound engagement	2.1 Greet customer according to organisational protocol and in a manner that encompasses cultural diversity 2.2 Use engagement guide efficiently to conduct the engagement 2.3 Answer enquiries and negotiate with customers according to policy 2.4 Escalate enquiries that cannot be satisfied immediately 2.5 Conduct engagement closure according to policy
3 Arrange provision of product or service	3.1Respond appropriately to customer requirements and identify relevant options 3.2 Select appropriate product or service in consultation with customer 3.3 Agree actions or orders with customer, giving consideration to maximising value and service delivery to customer 3.4 Consider customer retention options that can be applied to engagement 3.5 Use clear, simple and easy-to-understand language and ensure responses are comprehensive
4 Manage customer engagement	4.1 Record details of engagement according to policy 4.2 Record and report difficulties not escalated that may present an opportunity for continuous improvement 4.3 Adapt to requirements and expectations of various customers when working in an outsource environment and dealing with multiple customer bases 4.4 Escalate enquiries or orders that cannot be satisfied immediately 4.5 Supply follow-up information to customer as required and in a timely manner 4.6 Observe relevant legislation, codes, regulations and standards throughout transaction

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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	• Identifies, analyses and evaluates text to determine legislative, regulatory and business requirements and confirm expected practices
Writing	4.1, 4.2	• Records key information relevant to enquiries and prepares simple reports using correct spelling and punctuation
Oral Communication	1.4, 1.6, 2.1-2.3, 2.5, 3.1-3.3, 3.5, 4.4, 4.5	• Articulates clearly using specific and relevant language suitable to audience to convey information, and uses listening and questioning to confirm understanding • Participates in a verbal exchange of ideas and elicits views and opinions of others by listening and questioning
Navigate the world of work	1.1, 2.3-2.5, 4.1, 4.4 4.6	• Recognises and follows explicit and implicit protocols and policies associated with customer engagement and escalation of issues • Takes personal responsibility for adherence to legal/regulatory responsibilities relevant to transactions
Interact with others	2.1, 4.3	• Takes some steps to vary structure, style, tone and vocabulary to suit needs of multiple customer bases and different customer expectations • Adjusts personal communication style to engage a culturally diverse customer base
Get the work done	1.1-1.6, 2.1-2.5, 3.1-3.4, 4.2-4.5	• Plans a range of generally routine tasks, accepting stated goals and aiming to achieve them efficiently • Prepares for outbound engagement in logically sequenced steps, in consultation with others as required • Analyses customer needs and selects suitable options, adjusting to customer preferences, and possibility of further service opportunities • Recognises and takes responsibility for addressing predictable, and some less predictable customer problems, recognising some are indicators of improvement opportunities • Understands purposes, specific functions and key features of common digital systems and tools and

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		operates them effectively to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE308 Conduct outbound customer engagement	BSBCCO308A Conduct outbound customer contact	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE308 Conduct outbound customer engagement

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:

- comply with organisational policy and procedures in preparation, conduct and closure of outbound customer engagements
- use and adapt communication skills for a wide customer base and different customer expectations
- use technology efficiently to record and manage engagement data.

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 company, products and services, and customer base
- identify organisational communication channels
- explain organisational performance and customer service expectations
- identify organisational policies, procedures, protocols and guidelines, including financial delegation policy
- explain principles of customer service
- explain principles of sales and negotiation
- outline operation of technology and systems used.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information technology and equipment

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- workplace information and data
- performance management records
- data and quality assurance guidelines
- call/engagement guides.

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

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BSBCUE309 Develop product and service knowledge for customer engagement operation

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 knowledge of products and services in preparation for customer engagement in an inbound or outbound customer engagement activity.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who may provide technical advice and support to a team. This work is undertaken with some supervision and guidance.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Acquire knowledge of products and services in a specified area	1.1 Identify information sources on products and services in a specified area and evaluate them for reliability and validity 1.2 Identify purpose and use of products and services 1.3 Identify and evaluate key features of products and services 1.4 Identify and evaluate strengths and weaknesses of products and

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ELEMENT	PERFORMANCE CRITERIA
	services 1.5 List relevant product and service support details
2 Evaluate full range of products and services in a designated area of business	2.1 Use a range of information sources to identify range of products and services in a designated area of business 2.2 Compare features, benefits, strengths and weaknesses of range of products and services available 2.3 Establish relative standing of organisation's products and services with alternatives, to communicate differences to buyer or user
3 Convert product and service knowledge into benefits	3.1 Identify features of products and services with potential buyer or user appeal 3.2 Present relevant features of products and services as benefits to stakeholder 3.3 Present benefits of products and services within context of organisational requirements and legislation

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, 3.1	• Sources and evaluates a range of texts to compare and contrast product and service information and identify key details for consumer consideration
Writing	1.1, 1.5, 2.2, 2.3, 3.2, 3.3	• Prepares detailed and factual product and service information to inform job role • Adjusts information to assist sales strategy and consumer decision-making
Oral Communication	3.2, 3.3	• Selects and uses clear and persuasive language when conveying information to a specific audience
Numeracy	1.1, 1.4, 3.1	• Recognises and extracts numeric data to determine key information according to internal and stakeholder requirements
Navigate the	1.1-1.4, 3.3	• Develops product and service knowledge related to role

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world of work		• Recognises and follows explicit and implicit protocols and legal requirements in relation to marketing products and services
Get the work done	1.1-1.4, 2.1-2.3 3.1-3.3	• Uses systematic, analytical processes, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria when acquiring and evaluating product and service knowledge and converting it to benefits

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE309 Develop product and service knowledge for customer engagement operation	BSBCCO309A Develop product and service knowledge for customer contact operation	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE309 Develop product and service knowledge for customer engagement operation

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:

- use a range of sources to identify key features and benefits of products and services within area of business
- prepare information for customer engagement in compliance with legal 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:

- describe features, benefits, strengths and weaknesses of a range products or services available in the organisation
- outline organisational policies and procedures relevant to customer engagement activities
- identify processes used to describe products or services
- describe ethical principles and key provisions of relevant legislation, codes of practice and national standards affecting customer engagement operations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- relevant legislation, codes of practice and national standards
- information sources about an organisation's products, services or ideas
- office equipment and resources.

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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

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BSBCUE403 Schedule customer engagement activity

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 schedule customer engagement activity and manage customer engagement schedules using manual and electronic systems.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources, and who may provide leadership and guidance to others with 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

Stakeholder Relations – Customer Engagement

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 Analyse engagement traffic data	1.1 Access engagement traffic data 1.2 Identify engagement traffic patterns over short and long intervals 1.3 Identify anomalies and non-recurring events in engagement patterns
2 Review forecasting and planning	2.1 Incorporate identified range of contact centre or customer engagement phenomena into resource planning

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Incorporate issues arising from impact of customer engagement phenomena when forecasting and planning
3 Plan labour requirements	3.1 Determine basic inputs to queuing tools 3.2 Calculate resources required using queuing tools 3.3 Adjust results to account for quantitative and qualitative factors 3.4 Schedule levels of forecasted call and engagement traffic 3.5 Maximise operational efficiency and customer service levels in schedules while minimising wage costs 3.6 Use available skill base appropriate to schedule most effective use of human resources 3.7 Communicate schedules to staff 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	Performance Criteria	Description
Writing	3.7	• Records scheduling information clearly and accurately
Oral Communication	3.7	• Participates in exchanges with relevant others using clear and concise language to convey and confirm information
Numeracy	1.2, 1.3, 2.1, 3.2, 3.3 3.5	• Interprets relatively complex operational data to perform calculations and forecast call and contact traffic levels • Calculates scheduling requirements and related labour costs, making adjustments for circumstances that affect efficiency and cost minimisation goals
Get the work done	1.1, 1.3, 2.1, 2.2, 3.1, 3.2, 3.4-3.7	• Uses logical steps to perform resource planning; identifying, extracting and evaluating relevant information • Uses analytical processes and problem-solving techniques to predict customer contact scheduling requirements with consideration of expected and unexpected circumstances in business operations • Considers staff skill-base when making decisions

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		about scheduling to maximise efficiency and effectiveness, and manages related communication • Uses a range of digitally based information systems and applications to access and filter data, and extract, organise and integrate information to plan staff scheduling and maintain call centre efficiencies

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE403 Schedule customer engagement activity	BSBCCO403A Schedule customer contact activity	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE403 Schedule customer engagement activity

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:

- prepare customer engagement schedules demonstrating effective use of key features of contact traffic measurement systems
- analyse and use staff skill-base for efficient scheduling and maintenance of reasonable salary costs.

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 budgeting principles
- identify engagement traffic measurement systems
- outline operating environment requirements and objectives
- identify organisational communication methods and protocols
- identify queuing and forecasting tools
- describe techniques for scheduling call and engagement traffic.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information and databases for analysis activities
- standards and guidelines in relation to customer engagement scheduling.

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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

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BSBCUE404 Collect, analyse and record information

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 gather, collate and record information from a variety of sources, including database systems.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources, and who may provide leadership and guidance to others with 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

Stakeholder Relations – Customer Engagement

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 Obtain, record and analyse information	1.1 Identify information sources 1.2 Collect and record information according to organisational procedures and legislative and policy requirements 1.3 Collate and sort collected information in relation to purpose for which it is being obtained 1.4 Ensure contents of recording forms and reports used meet organisational processes

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ELEMENT	PERFORMANCE CRITERIA
2 Reduce, describe and review information	2.1 Identify information to be analysed and identify analysis methodology and analysis processes 2.2 Reduce and describe subject to support development of interpretations 2.3 Review appropriateness of reduced information according to organisational processes 2.4 Archive information not used in reduction and description processes for future reference
3 Develop inferences	3.1 Test interpretations to review credibility and consistency 3.2 Refine and consolidate interpretations to strengthen inferences drawn 3.3 Formulate inferences from facts and tested interpretations, incorporating chain of reasoning to ensure transparency to clients and users 3.4 Inform clients and users of assumptions in arguments leading to inferences 3.5 Assess and report relationship between information developed and probable interpretations, ensuring validity and compliance with organisational guidelines 3.6 Develop sound recommendations informing users of intelligence analysis outcomes

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, 2.3	• Identifies, analyses and reviews relevant complex information and data to ensure it meets organisational requirements
Writing	1.2, 1.4, 2.2, 3.2-3.6	• Prepares accurate information in required formats • Critically reviews and summarises information to establish key interpretations and credible conclusions • Documents analytical processes and outcomes, projected interpretations and recommendations in style

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		and format appropriate to a specific audience
Oral Communication	3.4, 3.5	• Articulates ideas and requirements clearly based on techniques appropriate to audience and environment
Navigate the world of work	1.2, 1.4, 2.3, 3.5	• Takes personal responsibility for adherence to legal/regulatory and organisational requirements related to collecting, recording and reviewing information
Get the work done	1.1, 1.3, 1.4, 2.1 2.4, 3.1, 3.3, 3.5	• Accepts responsibility for planning and sequencing collection, recording and analysis of information, taking required processes and relevant communication into account • Uses systematic, analytical processes to identify and collate relevant information, analyse content to make sound judgements and produce valid recommendations for use by others • Uses a range of digitally based technology and applications to access and filter data, and extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE404 Collect, analyse and record information	BSBCCO404A Collect, analyse and record information	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE404 Collect, analyse and record information

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:

- collect, record, collate and store information according to organisational and legislative requirements
- analyse, interpret and summarise information according to organisational processes
- develop recommendations based on outcomes of analysis for use by 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:

- identify relevant information types and sources
- describe procedures and security measures for accessing, storing, retrieving and sharing information
- outline legislative requirements relating to information collection and methodology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- information and databases for analysis activities
- organisational procedures, policies and processes
- relevant legislation, standards and guidelines.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBCUE405 Survey stakeholders to gather and record information

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 prepare, survey and record relevant and required details of information collected according to organisational, legislative and regulatory requirements.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources, and who may provide leadership and guidance to others with 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

Stakeholder Relations – Customer Engagement

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 Obtain, record and analyse information	1.1 Identify information sources 1.2 Collect and document information according to organisational procedures and legislative and policy requirements 1.3 Collate, sort and analyse information collected in relation to purpose for which it is being obtained

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Ensure contents of recording forms and reports are in line with organisational requirements
2 Take and compile statements	2.1 Take comprehensive statements from sources appropriate to matter being investigated, according to organisational procedures and legislative and policy requirements 2.2 Use active listening when taking accurate statements from people
3 Conduct interviews	3.1 Plan, manage and conduct interviews to gather maximum information relevant to matter being examined 3.2 Treat all interviewees fairly and equitably 3.3 Conduct and record interviews according to legislation, policy and procedures
4 Use information and database systems	4.1 Enter information into database, adhering to data entry security procedures 4.2 Identify and use appropriate sources of information when recording data 4.3 Access and store information according to legislation, policy and procedures
5 Use interview and evidence recording equipment	5.1 Operate recording equipment according to legislation, policy and procedures 5.2 Produce records according to organisational requirements and procedures 5.3 Maintain equipment and usage logs in good order
6 Conduct follow-up activities	6.1 Identify and use communication links within organisation to exchange information 6.2 Assess relevance of information received in terms of its intended purpose 6.3 Dispose of irrelevant information according to legislation, policy and procedures

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.4, 4.2, 6.2	• Analyses and reviews a range of texts of varying complexity to determine relevance, accuracy and usefulness
Writing	1.2	• Documents a range of required information using structure, detailed language and format appropriate to purpose
Oral Communication	2.1, 2.2, 3.1, 3.3, 6.1	• Participates effectively in exchanges with others using structure and tone appropriate to gather and exchange information • Uses questioning techniques and active listening to confirm details and clarify responses
Navigate the world of work	1.2, 1.4, 2.1, 3.2, 3.3 4.3, 5.1, 5.2, 6.3	• Takes personal responsibility for adherence to legal/regulatory and organisational requirements when planning and undertaking information collection, review, storage, exchange and disposal
Interact with others	3.1, 3.2, 6.1	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to build rapport and seek information
Get the work done	1.1, 1.3, 3.1, 4.1-4.3 5.1-5.3, 6.2	• Accepts responsibility for planning, organising and implementing routine and non-routine tasks to manage information collection processes, storage and disposal • Uses systematic, analytical processes to identify and gather relevant information to established criteria • Understands purposes, specific functions and key features of database systems and tools and operates them effectively to complete routine tasks • Uses digital recording technologies and systems safely, legally and ethically when gathering, storing, accessing and sharing information

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.

Records must be:	• authorised, stored and assessed in line with organisational procedures • clear, audible and presentable.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE405 Survey stakeholders to gather and record information	BSBCCO405A Survey stakeholders to gather and record information	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE405 Survey stakeholders to gather and record information

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:

- source, analyse and record information in compliance with organisational requirements
- use professional interview techniques to conduct and record interviews, including audiotapes and statements if applicable to role, according to relevant statutory, regulatory and legislative requirements
- access, store and dispose of information in compliance with legal 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:

- identify information types and their sources
- outline procedures and security measures for accessing, storing, retrieving and sharing data from databases
- describe rights of individuals in relation to conduct of interviews and compilation of statements
- identify statutory, regulatory and legislative requirements relating to surveying stakeholders
- outline use of evidence and contact recording technology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

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- information and databases for analysis
- relevant legislation, standards and guidelines
- interviewees
- recording equipment.

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

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BSBCUE406 Run a multicentre

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 strategies to manage organisational systems to oversee a multicentre.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources, and who may provide leadership and guidance to others with 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

Stakeholder Relations – Customer Engagement

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 Plan oversight of a multicentre	1.1 Assess nature of multicentre 1.2 Incorporate needs of customers in planning processes 1.3 Ensure plans achieve quality, time and cost specifications agreed with customers
2 Monitor, adjust and review multicentre service	2.1 Use appropriate strategies to monitor progress in achieving product and service targets and standards 2.2 Use appropriate strategies to obtain customer feedback to

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ELEMENT	PERFORMANCE CRITERIA
	improve provision of products and services 2.3 Develop, procure and use resources to provide quality products and services to customers
3 Review service	3.1 Make decisions to overcome problems and to adapt customer service and product delivery, in consultation with appropriate individuals and groups 3.2 Assist colleagues to overcome difficulty in meeting customer service standards and escalate enquiries appropriately 3.3 Manage records, reports and recommendations within 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	Performance Criteria	Description
Reading	2.1, 2.3, 3.3	• Interprets, analyses and monitors textual information to establish requirements and confirm understanding
Writing	1.2, 2.3,	• Prepares information which incorporates specialised and cohesive language in a format and style appropriate to purpose and audience
Numeracy	1.3	• Calculates time and costs required to achieve plans
Oral Communication	1.3, 2.2, 2.3, 3.1, 3.2	• Participates effectively in interactions to articulate requirements and confirm and clarify understanding • Elicits views and opinions of others and obtains information by listening and questioning
Navigate the world of work	3.3	• Takes responsibility for adherence to organisational processes and protocols when performing role
Interact with others	3.1, 3.2	• Selects and uses appropriate conventions and protocols when engaging stakeholders in discussion about management of customer service standards and problem resolution
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.3	• Develops, implements and monitors plans to manage service operation and delivery in a multicentre to meet customer requirements

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		• Accepts responsibility for service performance targets and uses analytical and consultative processes to identify service issues and implement improvements • Uses main features and functions of digital tools and systems to access information and complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE406 Run a multicentre	BSBCCO406A Run a multicentre	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE406 Run a multicentre

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 plans to meet customer service requirements using effective management and consultation strategies
- monitor service performance and demonstrate proficiency in resolution of complaints and continuous improvement of customer service delivery in accordance with organisational policies and procedures.

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 multicentre service requirements
- describe principles and techniques involved in management and resolution of customer complaints
- explain quality customer service delivery
- outline record-keeping and management methods
- explain strategies for monitoring, managing and introducing ways to improve customer service relationships

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- appropriate documentation and resources normally used in a multicentre
- customer feedback.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBCUE407 Administer customer engagement 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 manage, program, monitor and rectify potentially complex problems with telecommunications technology and improve functioning of multichannel equipment.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources, and who may provide leadership and guidance to others with 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

Stakeholder Relations – Customer Engagement

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 Reprogram multichannel system software	1.1 Confirm details of request for system changes with relevant stakeholders 1.2 Select appropriate reprogramming methods 1.3 Implement procedures for reprogramming multichannel systems 1.4 Check and confirm outcome of reprogramming against initial

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ELEMENT	PERFORMANCE CRITERIA
	request 1.5 Initiate action to address reprogramming requirements
2 Produce system reports	2.1 Confirm purpose and details of report type 2.2 Generate system reports effectively and efficiently 2.3 Modify system reports, where necessary, to meet stakeholder requirements 2.4 Distribute reports to target audience in a timely manner 2.5 Clarify and explain report details to target audience as required
3 Manage multichannel system faults	3.1 Identify system faults and select best repair options 3.2 Escalate faults if necessary and in a timely manner 3.3 Implement fault repair and monitor repair progress closely 3.4 Select and implement contingency plans according to 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 Criteria	Description
Reading	1.4	• Recognises and interprets textual information to compare request with process outcomes
Writing	2.2, 2.5, 3.4	• Prepares detailed information incorporating industry specific language in a format and style appropriate to a specific audience
Oral Communication	1.1, 1.4, 2.1, 2.5	• Elicits information and confirms requirements of others using active listening and questioning
Numeracy	2.2, 2.3, 2.5	• Uses mathematical calculations to check, interpret and confirm results of system tests
Navigate the world of work	3.4	• Takes responsibility for implementation of necessary plans in compliance with organisational procedures
Interact with others	1.1, 2.1, 2.5	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders about customer contact systems

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Get the work done	1.1-1.5, 2.1, 2.2-2.4, 3.1-3.4	• Accepts responsibility for planning and sequencing complex reprogramming tasks and workload and manages relevant communication • Applies problem-solving processes to identify and repair routine and non-routine system faults, and monitors progress to identify the need for, and type of, contingency plan • Understands key principles and concepts underpinning design and operation of digital telecommunication systems and tools and applies these to identify faults and generate reports • Uses a range of digital tools and applications to access and filter data, and extract, organise, integrate and share system information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE407 Administer customer engagement technology	BSBCCO407A Administer customer-contact technology	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE407 Administer customer engagement 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:

- reprogram system functions as required
- generate high-quality and accurate system reports in a timely manner
- manage communication effectively with stakeholders
- identify and distinguish between major and minor system faults
- identify and implement major fault contingency plans according to organisational procedures.

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 objectives and how technology supports them
- identify crisis management plans
- identify escalation paths and guidelines
- identify reporting requirements of the organisation
- describe multichannel technology, including hardware and software.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- workplace information, data and reporting
- service-level guidelines and standards

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- appropriate computer and telecommunications resources
- stakeholder feedback.

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

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BSBCUE501 Develop business continuity strategy

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 business continuity plans, processes and tools aimed at keeping as many as possible of the business critical operations operating during a crisis or implementation of a disaster recovery plan.

It applies to individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies, and who will work closely with other members of an organisation and have a high degree of autonomy with managerial responsibility.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Evaluate impact of the situation on business operations	1.1 Evaluate immediate impact of situation on business operations 1.2 Identify business functions potentially impacted 1.3 Determine likely timing before normal operations will be restored 1.4 Define and agree with stakeholders on parameters (timings)

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ELEMENT	PERFORMANCE CRITERIA
	that will determine employment of disaster recovery procedures 1.5 Liaise with and consult affected parties and stakeholders
2 Identify business critical functions	2.1 Determine business imperatives that must be addressed or continue 2.2 Consider practical options to maintain business critical operations 2.3 Consult all major stakeholders and agree on priorities
3 Develop plan to maintain business critical operations	3.1 Determine available back-up facilities or systems 3.2 Map how business critical functions can be continued using a modified approach 3.3 Evaluate resourcing requirements 3.4 Consider work, health and safety (WHS) requirements in formation of plan 3.5 Determine need for a communication plan to be developed and implemented, and document plan as required 3.6 Communicate plan to stakeholders
4 Develop plan to update enterprise systems or information when systems become available	4.1 Evaluate impact of modified operations on organisational information systems 4.2 Determine resources required to input manually collected data into systems and complete follow-up action 4.3 Work with stakeholders to consider downstream impacts 4.4 Develop communication plan to ensure all stakeholders are informed of status
5 Evaluate organisational performance reports	5.1 Evaluate effectiveness of business continuity activities 5.2 Seek stakeholder feedback 5.3 Determine areas for improvement 5.4 Modify business continuity plan documentation incorporating improvement areas

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	2.1, 5.1	• Interprets and evaluates relevant business and legal information to establish priorities and inform decision-making
Writing	3.2, 3.5, 3.6, 4.4, 5.2, 5.4	• Develops and organises content to support format and purpose of detailed business continuity and communication strategy plans • Uses clear, logically organised structures and appropriate language to develop recommendations and improvement opportunities
Oral Communication	1.4, 1.5, 2.3, 3.6, 4.3 5.2	• Articulates ideas and requirements clearly and calmly using language appropriate to audience and environment • Elicits views and opinions of others and obtains information by listening and questioning
Navigate the world of work	3.4	• Identifies implications of workplace safety legislation in development of plans
Interact with others	1.4, 1.5, 2.3, 3.6, 4.3, 5.2	• Selects and uses appropriate conventions and protocols when communicating with stakeholders about business continuity plans and their implementation • Takes a leadership role in developing stakeholder understanding of operational changes and follow-on impacts
Get the work done	1.1-1.3, 2.1, 2.2, 3.1-3.3, 3.5, 4.1, 4.2, 4.4, 5.1, 5.3	• Uses formal, logical planning processes to identify relevant information and risks, identify and evaluate alternative strategies and resources, and manage communication required for continuity of business functions • Uses systematic, analytical processes to develop plans for complex, non-routine situations identifying manual work processes and evaluating short-term impact of reduced service on organisation • Evaluates effectiveness of planning decisions and identifies and incorporates improvements • Understands key principles and concepts underpinning design and operation of digital systems and tools in relation to information systems

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE501 Develop business continuity strategy	BSBCCO501B Develop business continuity strategy	Updated to meet Standards for Training Packages Code changed to reflect industry practice Minor edits to clarify meaning of elements	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE501 Develop business continuity strategy

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, document implement and review business continuity plans that meet organisational and legislative requirements
- manage effective consultation and feedback from stakeholders.

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 emergency procedures for site and organisation
- identify infrastructure employed in a business environment, including facilities, technology, resources and systems
- identify key personnel within workplace management structure
- outline work health and safety (WHS) requirements in workplace
- explain organisational crisis management and disaster recovery plans
- identify other relevant organisational, statutory, regulatory and legislative requirements
- outline organisation's expectations in relation to continuity of key business activities in time of crisis or incident
- outline principles of contingency planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- information and databases for analysis activities

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- relevant legislation, standards and guidelines
- interaction with others
- training records and minutes of meetings where business continuity has been discussed or training has been implemented.

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

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BSBCUE502 Establish a multicentre

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 strategies to establish organisational systems for a multicentre that administers product or service support or sales, or manages information enquiries from consumers.

It applies to individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies, and who will work closely with other members of an organisation and have a high degree of autonomy with managerial responsibility.

A multicentre may be operated through extensive open workspaces, with workstations that may include computers and a telephone set/headset connected to a telecom switch.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Plan oversight of multicentre	1.1 Assess nature of multicentre 1.2 Develop multicentre plan incorporating needs of customers in

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ELEMENT	PERFORMANCE CRITERIA
	planning processes 1.3 Ensure plans support quality, time and cost specifications agreed with customers
2 Design multicentre service	2.1 Develop and use strategies to monitor progress in achieving product and service targets and standards 2.2 Develop and use strategies to obtain customer feedback to improve provision of products and services 2.3 Develop, procure and use resources to provide high-quality products and services to customers 2.4 Develop strategies to overcome problems and to adapt customer services, products and service delivery in consultation with appropriate individuals and groups 2.5 Record plans according to organisation's systems and processes
3 Implement plans to establish multicentre	3.1 Make provision for staffing or staff training requirements to facilitate achievement of targets and standards 3.2 Implement work processes and strategies 3.3 Implement monitoring processes to make provision for future evaluation of targets and standards

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
Writing	1.2, 1.3, 2.2, 2.3, 2.5	• Develops and organises content to support format and purpose of a range of multicentre plans • Uses logically organised structures and clear language appropriate to audience and purpose in other necessary workplace documentation
Oral Communication	2.3, 2.4	• Uses appropriate language and non-verbal features to elicit views and opinions of others and obtains information by listening and questioning
Numeracy	1.2, 1.3	• Interprets numerical information and applies basic mathematical calculations to formulate and check

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		specifications
Navigate the world of work	2.5	• Takes responsibility for adherence to organisational systems and processes when recording plans
Interact with others	2.4	• Identifies and uses appropriate conventions and protocols when conferring with individuals, teams and other stakeholders about multicentre service issues
Get the work done	1.1-1.3, 2.1-2.4, 3.1-3.3	• Uses a combination of formal, logical planning processes and an increasingly intuitive understanding of context to identify relevant information and resources, identify and evaluate alternative strategies when developing plans • Uses systematic, analytical processes in assessing nature of centre and ensuring plans meet requirements, including setting goals and establishing performance monitoring systems • Identifies and evaluates solutions to operational and service problems in consultation and collaboration with others • Uses digital systems and tools for data collection, feedback and communication

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE502 Establish a multicentre	BSBCCO502A Establish a multicentre	Updated to meet Standards for Training Packages Code changed to reflect industry practice Minor edits to clarify meaning of Performance Criteria	Equivalent unit

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Links

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Assessment Requirements for BSBCUE502 Establish a multicentre

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 implement plans for delivering high-quality customer service
- identify and implement strategies to monitor service targets and standards
- solve complex customer issues and multicentre system problems that lead to poor customer service.

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 multicentre establishment requirements and multicentre service requirements
- identify multicentre systems operational capacity
- explain techniques for solving complaints, including management and organisational principles and techniques related to customer needs and behaviour, problem identification and resolution, customer relations, and product and service quality
- describe high-quality customer service delivery
- outline record keeping and management methods
- explain strategies for monitoring, managing and introducing ways to improve customer service relationships
- identify strategies to obtain customer feedback.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

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- appropriate documentation and resources
- interaction with others
- information and databases for analysis activities
- relevant legislation, standards and guidelines.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBCUE503 Manage data interrogation

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 data interrogation from a variety of sources, including database systems.

It applies to individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies, and who will work closely with other members of an organisation and have a high degree of autonomy with managerial responsibility.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Provide guidance to interrogate data	1.1 Identify information sources 1.2 Assist personnel to collect and record information according to legislation, policy and procedures 1.3 Assist personnel to collate, sort and analyse collected information in relation to purpose for which it is being obtained
2 Assist personnel to	2.1 Identify information to be analysed and identify analysis

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ELEMENT	PERFORMANCE CRITERIA
interrogate data	methodology and analysis processes 2.2 Assist personnel to reduce and describe subject to support development of interpretations 2.3 Review appropriateness of reduced information according to organisational processes 2.4 Inform personnel how to archive information not used in reduction and description processes for future reference 2.5 Implement supervisory processes, checks and measures to ensure work is completed within time available
3 Provide suitable training and assessment opportunities	3.1 Identify learners' personal skill gaps 3.2 Provide appropriate on-the-job training opportunities to fill identified skill gaps and improve work performance 3.3 Provide opportunities for personnel to ask questions and seek clarification on training and work performance matters 3.4 Provide assistance to personnel to ensure compliance with organisational requirements and access suitable training and assessment

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	• Analyses and consolidates information from a range of sources against defined criteria and requirements and checks for accuracy and completeness
Oral Communication	1.2, 1.3, 2.2, 2.4, 3.3, 3.4	• Elicits views and opinions of others and obtains information by listening and questioning • Articulates requirements and instructions clearly, using language and specific industry terminology appropriate to audience and environment
Numeracy	1.3, 2.1-2.3	• Analyses and synthesises mathematical information embedded in a broad range of tasks and texts
Navigate the world of work	1.2, 2.3, 3.4	• Takes personal responsibility for ensuring personnel understand and follow legal/regulatory and organisational requirements and have access to

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		appropriate training to address skill gaps
Interact with others	1.2, 1.3, 2.2, 2.4, 3.2-3.4	• Demonstrates sophisticated control over oral, visual or written formats, drawing on a range of communication practices to convey technical and compliance information to personnel • Provides feedback on performance and encourages interaction to clarify individuals' skill requirements to reach agreed goals
Get the work done	1.1, 2.1-2.5, 3.1, 3.2	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses systematic, analytical processes to gather relevant information, and identify and evaluate options against agreed criteria, when assisting personnel to perform data interrogation tasks • Uses a range of digital tools and applications to access and filter data, and extract, organise, integrate and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE503 Manage data interrogation	BSBCCO503A Manage data interrogation	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE503 Manage data interrogation

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 guidance to individuals and groups to collect, record, collate and sort information in accordance with organisational, regulatory and legislative requirements
- provide guidance to individuals and groups to perform interrogation of data in accordance with organisational processes
- monitor work progress of others
- identify and manage personnel training requirements to ensure organisational and regulatory 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 how to extract, analyse and reduce information from databases and other sources
- identify organisational and regulatory requirements for data collection and interrogation
- identify organisational structure and key stakeholders
- describe information types and their sources
- describe procedures and security measures for accessing, storing, retrieving and using data from databases
- explain range of engagement data available, technology functionality and reporting capability
- describe use of engagement recording technology to obtain statements.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- interaction with others
- information and databases for analysis activities
- relevant legislation, standards and guidelines.

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

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BSBCUE504 Integrate customer engagement within 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 fully integrate customer engagement to ensure customers maintain a high profile and significance within the organisation.

It applies to individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies, and who will work closely with other members of an organisation and have a high degree of autonomy with managerial responsibility.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Identify and analyse interdependencies	1.1 Identify interdependencies between engagement centre and other departments within the organisation 1.2 Identify the degree of interdependence 1.3 Map the flow of transactions and information between other departments and the engagement centre

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ELEMENT	PERFORMANCE CRITERIA
2 Analyse value and service chain and identify gaps	2.1 Develop value and service chain model 2.2 Consult regularly with stakeholders 2.3 Collect data to support chain continuity and gap identification 2.4 Identify gaps in value and service chain
3 Prepare plan to close value and service chain gaps	3.1 Identify service chain gaps within control of customer engagement operations 3.2 Communicate other gaps to stakeholders and relevant parties 3.3 Identify activities and resources needed to close gaps 3.4 Prepare action plan 3.5 Establish review and feedback process 3.6 Develop internal networks to ensure sound communication across organisation
4 Integrate market intelligence capture into operations	4.1 Consult with organisation marketing area or business unit 4.2 Identify and agree on desired market intelligence 4.3 Integrate data collection into engagement guidelines 4.4 Integrate data-capture facilities into database 4.5 Integrate information into existing engagement strategy and operations
5 Report market intelligence to other corporate departments	5.1 Retrieve captured intelligence information 5.2 Prepare market-intelligence reports 5.3 Communicate information to relevant parties in an effective and timely manner

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, 3.1, 3.3 5.1	• Interprets and analyses textual information in a variety of forms to obtain and apply requirements

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Writing	1.3, 2.1, 2.3, 3.4, 3.6 4.1, 4.3, 4.5, 5.2, 5.3	• Develops diagrams and detailed value and service chain model and related plans, which incorporate evaluation of information, requirements, and recommendations • Uses structure, format and language appropriate to audience
Oral Communication	2.2, 3.2, 4.1, 5.3	• Articulates instructions and requirements clearly, and uses listening and questioning strategies to elicit ideas and opinions and confirm understanding
Numeracy	2.1, 2.3	• Extracts and analyses data and numerical information embedded in relevant documents
Interact with others	2.2, 3.2, 3.6, 4.1, 4.2 5.3	• Collaborates with others to achieve joint outcomes, playing an active role in establishment of networks, facilitating effective discussion and agreement • Establishes and uses appropriate conventions and protocols when delivering reports to stakeholders
Get the work done	1.1, 1.2, 2.1, 2.3, 2.4 3.6. 4.3-4.5 5.3	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses analytical processes to develop plans, establishing criteria for decisions about activities, resources and processes required to close service chain gaps • Uses systematic, analytical processes to integrate market intelligence into operations, defining relevant information, and making a range of relatively complex technical and operational decisions to achieve required outcomes • Uses a range of digital technology and applications to access and filter data, and extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE504 Integrate customer engagement within the organisation	BSBCCO504A Integrate customer contact operations in the organisation	Updated to meet Standards for Training Packages Name changed to reflect industry	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		practice	

Links

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

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Assessment Requirements for BSBCUE504 Integrate customer engagement within 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:

- analyse and document interdependencies and information flow between departments and the engagement centre
- analyse data and prepare plans to close gaps in value and service chain
- negotiate integration of market intelligence capture into operations and prepare a report in compliance with organisational policies and 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:

- evaluate analytical methods and techniques, such as:
  - strengths, weaknesses, opportunities and threats (SWOT)
  - balanced scorecard
  - return on investment (ROI)
  - economic value added
- explain compliance policies and requirements applicable to organisation
- explain corporate aims and objectives
- outline market intelligence and data-gathering principles
- outline information technology infrastructure, functionality and reporting capability
- explain organisational communication methods, including reporting lines and key personnel required to effect change.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work. This includes access to:

- workplace information and data
- stakeholder feedback or stakeholders
- meeting documentation and minutes
- market intelligence reports
- value and service chain model analysis.

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

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BSBCUE601 Optimise customer engagement operations

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 use data and statistical tools to monitor and optimise customer contact processes.

It applies to individuals who analyse, design and execute judgements using wide- ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Analyse customer contact processes using statistical tools	1.1 Identify customer contact processes requiring analysis 1.2 Measure the impact of these processes on service levels or other indicators using statistical tools 1.3 Derive tolerance levels for processes 1.4 Calculate upper and lower control limits from data 1.5 Investigate reasons for performance outside of control limits
2 Rectify productivity	2.1 Conduct a qualitative and quantitative analysis of current

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ELEMENT	PERFORMANCE CRITERIA
impediments	productivity against organisational standards and aims 2.2 Identify causes of productivity impediments 2.3 Apply service quality and quality management tools to minimise impediments 2.4 Confirm that operations achieve productivity standards
3 Conduct a process review	3.1 Identify components of the process under review 3.2 Analyse and modify process to achieve improved performance using graphical techniques 3.3 Trial and revise modified process to meet organisational efficiency standards 3.4 Document revised process using graphical techniques
4 Benchmark customer contact operations	4.1 Identify appropriate target areas for process improvement 4.2 Research and nominate benchmarking organisations that demonstrate relevant best practice 4.3 Document relevant best-practice processes used by benchmarking organisations 4.4 Identify processes from benchmarking organisations that can be adopted 4.5 Identify relevant benefits and risks associated with implementing new processes 4.6 Adapt best-practice processes to meet enterprise conditions 4.7 Identify and document appropriate performance indicators for evaluation of the new processes

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, 3.1, 4.2	• Recognises and interprets textual information to establish processes and confirm understanding • Identifies, analyses and evaluates complex texts to determine best practice

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Writing	3.2, 3.4, 4.3, 4.4, 4.7	• Prepares information which incorporates specialised language in a format and style appropriate to audience and context • Records information incorporating evaluations and recommendations for future improvements
Numeracy	1.2, 1.3, 1.4, 2.1, 2.4, 3.2, 3.4, 4.7	• Extracts, evaluates and compares numerical information • Uses mathematical formulae and calculations to estimate and plan project costs and timeframes
Get the work done	1.1, 1.2, 1.5, 2.2, 2.3, 2.4, 3.1-3.3, 4.1, 4.2, 4.4-4.7	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses formal analytical and lateral-thinking techniques to identify issues, generate possible solutions and decide on most appropriate option • Uses digital tools to access, analyse and organise complex data • Considers new ways to model, visualise, interact with and present complex information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE601 Optimise customer engagement operations	BSBCCO601B Optimise customer contact operations	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE601 Optimise customer engagement operations

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:

- monitor and optimise customer contact processes
- analyse customer contact processes using statistical tools and graphical techniques
- investigate reasons for performance outside of control limits and impediments to productivity
- conduct a qualitative and quantitative analysis against the organisational standards
- review, trial and modify processes
- benchmark the operations including researching and documenting best practice processes, performing a risk/benefit analysis on possible approaches, implementing the improvements and documenting new performance indicators
- analyse statistical reports of contact centre process performance, explaining or demonstrating process improvement strategies and productivity improvement methodology
- analyse records of customer contact productivity measures, demonstrating knowledge of quality management and related process control methods.

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 one complete suite of statistical control systems
- explain benchmarking principles
- identify customer contact processes and the range of channels available
- describe customer service principles and processes
- identify operating variables within customer contact operations

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- explain principles of statistics, statistical process control and underpinning statistical calculations
- identify process review and documentation principles
- explain project management principles
- explain quality management and related process control methods.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information, reporting and databases for analysis activities
- relevant standards and guidelines
- benchmarking analysis and improvement plans
- 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

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BSBCUE602 Manage customer engagement information

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 customer engagement information and the management information systems (MIS) used in a customer engagement environment.

It applies to individuals who analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Select and set activity and transaction records and measurements	1.1 Analyse business plan and budget to identify relevant business information needs 1.2 Identify possible contact pathways 1.3 Identify measurement methods and MIS used in each step in engagement pathway 1.4 Configure information systems to capture required

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ELEMENT	PERFORMANCE CRITERIA
	measurements 1.5 Develop and implement testing procedures for transaction and call/engagement pathway measurements
2 Collect data	2.1 Identify data collection methods in information technology systems used 2.2 Monitor quantitative and qualitative data collection to ensure accuracy 2.3 Ensure data collection is segmented or sorted as required and provides the correct levels of information
3 Analyse MIS resulting from customer contact activities	3.1 Identify call/engagement traffic and transaction patterns and other trends and activities 3.2 Apply correct data analysis methodologies 3.3 Accurately interpret data
4 Prepare and present information	4.1 Identify stakeholders for engagement centre information 4.2 Tailor engagement centre information presentations for each stakeholder as appropriate 4.3 Present both short- and long-term engagement centre information system reports 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.3, 3.2, 3.3	• Recognises and interprets textual information to establish processes and confirm understanding • Identifies, analyses and evaluates complex textual information to accurately test data
Writing	4.3	• Prepares information which incorporates specialised language in a format and style appropriate to a specific audience
Oral Communication	4.2	• Presents information to a range of audiences using appropriate structure and language • Uses questioning and active listening to clarify or

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		confirm understanding
Numeracy	1.1, 1.3, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	• Extracts, evaluates and compares numerical information • Applies mathematical methodologies and calculations to analyse, test and interpret data
Navigate the world of work	1.1	• Considers own role in terms of its contribution to broader goals of the work environment
Interact with others	4.2-4.3	• Demonstrates an understanding of what to communicate, with whom and how when presenting information to stakeholders
Get the work done	1.1-1.5, 2.1-2.3, 3.1, 4.1	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Systematically analyses data and information to identify and evaluate alternative strategies and resources and decide on appropriate options • Uses digital tools to access, analyse and organise complex data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE602 Manage customer engagement information	BSBCCO602B Manage customer contact information	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE602 Manage customer engagement information

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:

- analyse the call centre business plan and budget
- monitor and optimise customer contact information using a management information system
- select and set activity and transaction records and measurements and develop testing procedures
- monitor qualitative and quantitative data against the organisational standards to ensure it is accurate and correctly segmented or sorted
- analyse and interpret data for trends and patterns
- prepare and present both short-term and long-term call centre data to stakeholders
- develop, use, analyse and manage information systems to provide reliable and appropriate information and reporting to support the effective operation of a customer contact environment.

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:

- demonstrate knowledge of organisational call and other contact traffic management information systems
- describe organisational budgetary requirements and principles
- explain the organisational business plans and objectives
- explain methods of collecting reliable information and data and commonly encountered problems, and strategies for overcoming such problems
- explain organisational models and structures for managing customer contact information and the roles of key people

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- outline principles of electronic information management and methods of reporting information
- explain organisational reporting requirements and methodology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- a management information system
- information and databases for analysis activities
- call centre guidelines and standards
- call centre business plan and budget
- stakeholder feedback
- 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

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BSBCUE603 Design and launch new customer engagement facilities

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 design and establish new customer engagement facilities and substantial enhancement of existing centres.

It applies to individuals who analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Identify design elements	1.1 Analyse role and business needs of proposed customer contact facility 1.2 Define general characteristics of customer contact facility 1.3 Identify design elements to meet business needs 1.4 Confirm analysis with stakeholders
2 Develop detailed	2.1 Review facility design principles to confirm appropriateness of

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ELEMENT	PERFORMANCE CRITERIA
specifications	design 2.2 Delegate facility design elements to appropriately experienced specialist/s for detailed specification 2.3 Benchmark facility design against world-class standards to demonstrate appropriateness of specifications 2.4 Confirm design specifications with stakeholders
3 Evaluate resources	3.1 Identify budgetary limits for facility 3.2 Identify suitable resources available from organisation's preferred suppliers 3.3 Identify suitable alternative resources and suppliers for each design aspect 3.4 Conduct comparative analysis of each alternative 3.5 Recommend resources for each design aspect
4 Integrate design components	4.1 Prepare viable project management plan for the integration of new facility resources 4.2 Use project management tools throughout the integration process 4.3 Prepare contingency plans to meet all reasonable costs 4.4 Develop effective testing procedures and plans for all resources 4.5 Maintain vigilance over budget, quality of supplied resources, and quality of work 4.6 Communicate progress and concerns arising to senior management in a timely way
5 Launch customer contact facility	5.1 Prepare viable project management plan for the launch of the new customer contact facility 5.2 Use project management tools throughout launch process 5.3 Communicate launch parameters to relevant stakeholders 5.4 Establish pre-launch operational test procedures and launch plans 5.5 Supervise launch to completion according to plans and contingencies 5.6 Review launch and debrief with stakeholders to plan follow-up actions

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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, 3.2, 3.3	• Recognises and evaluates complex texts to determine key information according to stakeholder requirements
Writing	1.2, 2.3, 3.4, 3.5, 4.1, 4.4, 5.1, 5.4, 5.6	• Prepares information which incorporates specialised language in a designated format and style appropriate to a specific audience • Prepares specific information which conveys an understanding of outcomes and alternatives and uses terminology appropriate to present to relevant personnel
Oral Communication	2.2, 2.4, 4.6, 5.3, 5.5, 5.6	• Presents information to a range of audiences using appropriate structure and language • Uses questioning and active listening to clarify or confirm understanding
Numeracy	1.2, 1.3, 2.1, 3.1, 3.2, 3.4, 4.1, 4.2, 4.3, 4.4, 4.5, 5.1	• Extracts, evaluates and compares numerical information • Applies mathematical methodologies and calculations to analyse, test and interpret data and draw conclusions
Interact with others	1.4, 2.4, 4.6, 5.6	• Demonstrates an understanding of what to communicate, with whom and how, in relation to stakeholders and senior management
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.5, 4.1-4.6, 5.1-5.6	• Develops plans for complex, high-impact projects with strategic implications and specific timeframes that involve a diverse range of stakeholders with potentially competing demands • Uses systematic, analytical processes for planning and managing complex activities, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options • Recognises the potential of new approaches to enhance work practices and outcomes • Uses digital tools to access, analyse and organise complex data

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE603 Design and launch new customer engagement facilities	BSBCCO603B Design and launch new customer contact facilities	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE603 Design and launch new customer engagement facilities

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:

- design and establish or substantially enhance a customer engagement facility including
  - researching the requirements based on the business needs
  - developing detailed specifications by delegating to and managing specialists
  - managing the physical and human resources
- consult with stakeholders throughout the development process to confirm the requirements and specifications, report concerns and review and debrief
- prepare a viable project management plan and use project management tools for the development, testing and launch of the facility
- develop testing procedures an plans for all resources
- plan follow-up actions after the launch.

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 legislative, regulatory and organisational requirements for customer engagement facilities
- outline principles underpinning contact centre design at both the technology level and the human level with reference to:
  - emerging technologies
  - ergonomics of office design
  - hardware and telecommunications services
  - software systems
- identify sources of information, guidance and support for the project

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- identify systems and physical resources used in customer contact facilities
- explain project management principles
- describe research methods using a range of information sources
- describe risk management principles and practices.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the customer engagement field of work and include access to:

- relevant legislation, regulations, standards and guidelines
- organisational business plans and policies
- specifications of resources used in customer engagement facilities
- 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

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BSBCUE604 Develop and maintain a service level strategy

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, monitor and maintain a service level strategy in a customer engagement environment.

It applies to individuals who analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Analyse historical data	1.1 Distinguish between contact-wait characteristics and service level data 1.2 Collect relevant and accurate service level data 1.3 Determine historical service levels for service level periods 1.4 Collect relevant and accurate contact-wait time, abandonment rate and customer survey data 1.5 Determine historical contact-wait and abandon-time

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ELEMENT	PERFORMANCE CRITERIA
	characteristics
2 Formulate a service level policy	2.1 Describe the difference and impacts of providing the required service level against the industry standard 2.2 Consult with relevant stakeholders on contact-wait characteristics and service levels 2.3 Identify business needs related to service levels 2.4 Review organisation's contact-wait characteristics in relation to the industry, the market and competition 2.5 Formulate a comprehensive set of appropriate contact-wait characteristics 2.6 Define and document an appropriate service level policy or target 2.7 Develop comprehensive contingency plans for loss of facilities or technology 2.8 Identify and document corresponding resource requirements 2.9 Communicate and justify service level policy to senior management and stakeholders
3 Monitor and maintain service levels	3.1 Identify measurement capabilities of existing technology 3.2 Select diagnostic measures to monitor service levels 3.3 Collect and analyse service level data 3.4 Identify under-performing service level periods 3.5 Analyse service level inputs and recommend corrections to maintain service levels 3.6 Conduct benchmarking to compare performance to competitors and industry best 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, 3.6	• Recognises and evaluates complex texts to determine key information according to stakeholder requirements

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		and industry best practice
Writing	2.2, 2.5, 2.6, 2.7, 2.8, 2.9, 3.4, 3.6	• Prepares information which incorporates specialised language in a designated format and style appropriate to audience and purpose • Prepares specific information which conveys an understanding of outcomes and alternatives and uses terminology appropriate to context and audience
Oral Communication	2.2, 2.9	• Presents information to a range of audiences using appropriate language and structure • Uses questioning and active listening to clarify or confirm understanding
Numeracy	1.1, 1.3, 1.4, 1.5, 2.1, 2.4, 2.6, 3.2, 3.3	• Extracts, evaluates and compares numerical information • Applies mathematical methodologies and calculations to analyse, test and interpret data and draw conclusions
Interact with others	2.2, 2.9	• Participates in complex stakeholder consultations, initiating and taking the lead where appropriate • Tailors communication to achieve its purpose, demonstrating a sophisticated understanding of the needs, interests, issues and priorities of stakeholder and senior management audiences
Get the work done	1.1, 1.2, 1.4	• Sequences and schedules complex activities, monitors implementation and manages relevant communication when formulating policy • Uses systematic, analytical processes when analysing data and formulating policy, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses digital tools to access, analyse and organise complex data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE604 Develop and maintain a service level strategy	BSBCCO604B Develop and maintain a service-level strategy	Updated to meet Standards for Training Packages Code changed to reflect industry	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		practice	

Links

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

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Assessment Requirements for BSBCUE604 Develop and maintain a service level strategy

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, monitor and maintain a service level strategy and supporting policies and procedures
- analyse historical data to determine existing contact-wait and abandon-time characteristics
- formulate a comprehensive set of call-wait characteristics and targets based on the business needs and industry benchmarks
- consult with stakeholders to confirm requirements and verify the proposed service level strategy
- monitor and maintain service levels by collecting, analysing and acting on service level data
- develop a comprehensive contingency plan for loss of facilities or technology.

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 benchmarking principles
- describe business and financial planning (budget) principles
- identify business requirements for service level performance, which may include regulatory requirements
- describe the technology functionality and reporting capability of a management information system to provide service-level contact data
- describe industry standards, best practice and regulatory requirements for service levels
- describe the difference and impacts of providing the required service-level against the industry standard

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- explain the structure and organisation of workforce, including part-time, casual, contract and shift workers
- explain the organisational structure and who the key stakeholders are
- describe the processes for determining customer expectations and satisfaction with level of service.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the customer engagement field of work and include access to:

- information and databases for analysis activities
- industry and competitor benchmarking data
- historical contact-wait and abandon-time data
- relevant legislation, regulations, standards and guidelines
- stakeholder feedback
- 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

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BSBCUE605 Develop and maintain a customer engagement marketing strategy

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, maintain and promote a marketing strategy in a customer engagement environment.

It applies to individuals who analyse, design and execute judgements using wide ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Apply sales and marketing principles to performance	1.1 Select a valid framework of sales and marketing principles for a customer contact centre 1.2 Achieve consensus on sales and marketing principles with stakeholders 1.3 Integrate sales and marketing principles into customer contact operating objectives and strategies

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify elements of customer engagement centre supply chains 1.5 Promote engagement centre effectively to supply chain customers
2 Initiate, evaluate and maintain a marketing database system	2.1 Identify appropriate marketing database fields and functions 2.2 Contribute to the development and testing of a marketing database 2.3 Evaluate and enhance functionality of the marketing database to best serve the marketing operation 2.4 Establish effective database maintenance procedures 2.5 Establish contingency planning for failure of databases and systems
3 Develop and evaluate customer service and retention strategies	3.1 Identify effective after-sales support strategies 3.2 Develop strategies to retain customers and to build loyalty 3.3 Establish processes to facilitate after-sales support and customer retention strategies 3.4 Monitor and review after-sales support and customer retention processes 3.5 Adjust processes to optimise customer service and retention
4 Analyse sales and customer activity results	4.1 Identify sales and service report criteria relevant to the interests of stakeholders 4.2 Analyse sales and service data in relation to key performance indicators 4.3 Report on performance and activity data to stakeholders in a timely manner

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, 3.1	• Recognises and evaluates complex texts to determine key information

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Writing	1.2, 1.3, 1.5, 2.2, 3.2, 3.4, 4.3	• Prepares information which incorporates specialised and cohesive language in a designated format and style appropriate to a specific audience and purpose
Oral Communication	1.2, 1.5, 4.3	• Presents information to a range of audiences using appropriate structure and language • Uses questioning and active listening to clarify or confirm understanding
Numeracy	2.1, 4.2	• Extracts, evaluates and compares numerical information
Interact with others	1.2, 1.5, 3.4, 4.3	• Recognises and applies the protocols governing what to communicate and how in relation to stakeholders • Uses a range of persuasive techniques appropriate to audience and environment to negotiate agreeable outcomes
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.4, 3.5, 4.1, 4.2, 4.3	• Sequences and schedules complex activities, monitors implementation and manages relevant communication in relation to database maintenance, contingency planning and retention strategies • Makes a range of critical and non-critical decisions in relatively complex strategy-development situations, taking a range of constraints into account • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options when developing strategies • Uses digital tools to access, analyse and organise complex data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE605 Develop and maintain a customer engagement marketing strategy	BSBCCO605B Develop and maintain a customer contact marketing strategy	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUE605 Develop and maintain a customer engagement marketing strategy

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 marketing principles to customer engagement performance
- develop and maintain a marketing database system, including contingency planning
- develop customer service and retention strategies and integrate them into operating objectives and strategies
- communicate with stakeholders to promote the call centre, achieve consensus on sales and marketing principles, identify sales and services reporting criteria and report on performance and activity
- analyse and report on performance within a customer engagement environment.

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 engagement centre information systems and the types of data and information available from these systems
- explain contingency-planning principles
- outline customer retention strategies and industry and marketplace/competitor marketing strategies
- describe information technology options and functionality within the customer engagement centre environment
- identify process review and documentation processes
- outline sales and marketing principles
- outline the use and development of databases.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information and databases for analysis activities
- relevant legislation, regulations, standards and guidelines
- stakeholder feedback and sales and customer activity results to analyse
- performance and target data
- 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

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BSBCUE606 Forecast and plan using customer engagement traffic information analysis

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 analyse call or engagement traffic information to forecast and plan resourcing for customer engagement operations.

It applies to individuals who analyse, design and execute judgements using wide ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Analyse contact traffic data	1.1 Confirm the accuracy and appropriateness of contact traffic data 1.2 Identify call or engagement traffic patterns over short and long intervals 1.3 Identify anomalies and non-recurring events in engagement patterns
2 Interpret the impact of	2.1 Define and identify the range of engagement centre or customer

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ELEMENT	PERFORMANCE CRITERIA
customer contact phenomena on forecasting and planning	engagement phenomena affecting resource planning 2.2 Analyse and explain impact of phenomena 2.3 Identify issues arising from the impact of customer engagement phenomena when forecasting and planning
3 Develop contact traffic forecasts	3.1 Provide a baseline for forecast by collecting historical data 3.2 Collaborate with marketing, financial control and other areas to incorporate budget expectations and marketing efforts into forecast 3.3 Break down annual forecast into smaller periods and adjust for seasonality 3.4 Ensure that forecast accuracy is within organisational requirements
4 Plan labour requirements	4.1 Determine basic inputs to queuing tools 4.2 Calculate resources required using queuing tools 4.3 Adjust results to account for quantitative and qualitative factors 4.4 Perform planning process and scheduling for all levels of forecasted call and engagement traffic

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	• Recognises and evaluates complex texts to determine key information
Writing	2.1, 2.2, 2.3	• Prepares information in required format which incorporates specialised and cohesive language
Oral Communication	3.2	• Participates in discussions using appropriate structure and language for audience • Uses questioning and active listening to clarify or confirm understanding
Numeracy	1.2, 1.3, 3.1, 3.3, 4.2, 4.3	• Uses mathematical formula to calculate whole numbers and decimals to determine and predict scheduling requirements • Analyses data using mathematical methodologies to

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		predict different scenarios
Navigate the world of work	3.4	• Recognises and follows organisational requirements regarding forecasting accuracy
Interact with others	3.2	• 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 developing forecasts
Get the work done	1.1-1.3, 2.1-2.3, 4.1, 4.4	• Uses a combination of formal, logical planning processes and an increasingly intuitive understanding of context to sequence, schedule and monitor implementation of complex activities according to organisational requirements • Uses analytical processes to determine strategies by identifying options and establishing criteria for deciding between options • Uses digital tools to access and organise complex data and analyse multiple sources of information for forecasting and planning purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUE606 Forecast and plan using customer engagement traffic information analysis	BSBCCO606B Forecast and plan using customer contact traffic information analysis	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE606 Forecast and plan using customer engagement traffic information analysis

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:

- analyse contract traffic data and identify anomalies and non-recurring events in contact patterns
- prepare engagement forecasts
- calculate human resources required to support these forecasts
- plan and schedule for all levels of forecasted call and engagement traffic.

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:

- demonstrate knowledge of engagement measurement systems
- explain business planning and budgeting principles
- identify engagement traffic measurement systems
- list external factors and engagement centre operational factors potentially impacting on planning and forecasting
- explain operating-environment requirements and objectives
- outline organisational communication methods
- outline principles of statistical analysis and reporting
- describe queuing and forecasting tools and scheduling techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Stakeholder relations – customer engagement field of work and include access to:

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- information and databases for analysis activities
- standards and guidelines
- 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

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BSBCUE607 Manage customer engagement centre staffing

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 maintain stable and productive staffing levels in a business unit within a customer engagement centre, including the recruitment, induction, retention and training and regulatory and legislative compliance of staff.

It applies to individuals who analyse, design and execute judgements using wide ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Develop and apply recruiting and staff retention strategies	1.1 Develop and maintain job descriptions for customer engagement roles 1.2 Develop and maintain position profiles for customer engagement roles 1.3 Apply staff selection processes using interviewing techniques 1.4 Identify critical churn factors by analysing records of staff

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ELEMENT	PERFORMANCE CRITERIA
	turnover and exit interviews 1.5 Introduce staff retention strategies to reduce churn
2 Manage induction and ongoing staff training	2.1 Arrange for staff skill levels to be audited 2.2 Arrange the identification of skill needs and skill gaps for all customer engagement roles 2.3 Distinguish between technology skill and customer service skill needs 2.4 Develop training plans to meet identified skill gaps 2.5 Identify suitable sources of training support 2.6 Arrange training programs to reduce skill gaps for all staff
3 Establish a performance-management program	3.1 Develop and maintain key performance indicators (KPIs) or competency sets for all staff 3.2 Agree on KPIs with each customer contact staff member 3.3 Plan and maintain review dates and data collection to enable performance management 3.4 Conduct performance reviews and produce personal development plans
4 Manage remuneration and incentive programs	4.1 Determine KPIs for individuals and groups 4.2 Set appropriate remuneration levels for job accountabilities and industry 4.3 Initiate incentive schemes using KPIs that are within the control of staff 4.4 Regularly review remuneration and incentive schemes to ensure effectiveness 4.5 Implement audit process to ensure integrity of programs
5 Manage compliance with statutory and regulatory requirements	5.1 Maintain personal and staff awareness of relevant statutory and regulatory requirements 5.2 Ensure total compliance with statutory and regulatory requirements 5.3 Identify, record and rectify breaches of statutory and regulatory requirements 5.4 Implement compliance training and review programs as required

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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, 3.4, 4.4, 5.3, 5.4	• Recognises and evaluates complex texts to determine key information
Writing	1.1, 1.2, 2.4, 3.1, 3.2, 3.4, 5.3	• Prepares documents in a designated format and style appropriate to a specific audience and purpose • Creates and maintains records in required format
Oral Communication	1.3, 3.2, 3.4	• Participates in interviews or discussions using appropriate structure and language for audience • Uses questioning and active listening to clarify or confirm understanding
Numeracy	1.4, 3.3	• Uses basic mathematical formula to calculate whole numbers and decimals to determine and predict staffing levels and requirements
Navigate the world of work	5.1-5.4	• Monitors adherence to legal and regulatory rights and responsibilities for self and others
Interact with others	3.2, 3.4	• Provides feedback to others in forms they can engage with and respond to when conducting performance reviews
Get the work done	1.1, 1.2, 1.4, 1.5, 2.1-2.6, 3.1, 3.3, 4.1-4.5, 5.3, 5.4	• Develops flexible plans for complex, high-impact staffing management activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands • Uses systematic, analytical processes in complex, staffing management situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options in relation to staff training and development and incentive schemes • Uses digital tools to access, analyse and organise complex data

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE607 Manage customer engagement centre staffing	BSBCCO607B Manage customer contact centre staffing	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE607 Manage customer engagement centre staffing

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:

- write and maintain job descriptions, position profiles and key performance indicators for staff
- use interview techniques to select staff
- analyse records of staff turnover and exit interviews and identify strategies to reduce churn
- analyse staff training requirements and identify and fill skill gaps
- conduct performance reviews with staff and produce a personal development plans
- set, review and audit staff remuneration and incentive schemes and processes
- maintain compliance with statutory and regulatory 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 the legislative and regulatory context and organisational policy framework relevant to staffing
- explain the organisational recruitment process including:
  - role definition
  - selection criteria
  - direct and indirect assessment processes
- identify a range of reward and recognition strategies and initiatives
- describe skill auditing and training gap analysis methodologies
- outline strategies for the development of a positive compliance culture
- describe succession planning principles

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- describe training program design principles.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information and databases for analysis activities
- relevant legislation, regulations, standards and guidelines
- relevant workplace documentation and resources
- interaction with others
- 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

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BSBCUE608 Manage customer engagement operational costs

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 costs in a customer engagement environment.

It applies to individuals who analyse, design and execute judgements using wide ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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

Unit Sector

Stakeholder relations – Customer engagement

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 Calculate cost	1.1 Identify cost generating engagement centre transactions 1.2 Calculate transaction costs 1.3 Identify clearly fixed and variable components of transaction costs
2 Prepare budget	2.1 Produce accurate estimates of expected revenue supported by business and financial records 2.2 Identify expected operating expenses based on realistic

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ELEMENT	PERFORMANCE CRITERIA
	projections 2.3 Identify proposed capital expenditure based on business plans and estimates 2.4 Work closely with stakeholders to identify factors that may influence operations and costs 2.5 Prepare justifiable high, low and expected budget scenarios
3 Present and justify budget	3.1 Deliver an effective presentation of customer engagement centre budget 3.2 Justify aspects of operating expenses, revenues and capital expenditure 3.3 Introduce qualitative information into justification when appropriate
4 Monitor budget performance	4.1 Correlate statistical performance of engagement centre to budget estimates 4.2 Closely monitor variations between actual budget reporting and expected budget 4.3 Maintain accurate tracking of accrued, invoiced and other costs 4.4 Identify cash flow implications for current and planned events 4.5 Communicate progress against budget to stakeholders
5 Control financial operations	5.1 Closely monitor reasonable threats to budget on a regular basis 5.2 Identify variations in engagement centre performance that present threats to financial performance 5.3 Identify operational strategies to minimise threats to budget 5.4 Regularly monitor staff compliance with financial delegation limits 5.5 Regularly update organisation’s financial control systems

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

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Reading	1.1, 2.2, 2.3, 5.2	• Recognises and evaluates complex texts to determine key information
Writing	2.1, 3.2, 3.3, 4.5, 5.5	• Develops material for a specific audience using clear and detailed language and numerical data in order to convey explicit information, requirements and recommendations • Develops or reviews enterprise specific templates
Oral Communication	2.4, 3.1, 3.2, 3.3	• Clearly articulates information using relevant language appropriate to the audience and employs persuasive language in order to convey a specific message • Clearly articulates requirements using language appropriate to audience and environment and participates in a verbal exchange of ideas/solutions
Numeracy	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.5, 3.3, 4.1, 4.2, 4.3, 4.4	• Uses mathematical formula to calculate whole numbers and decimals to determine and predict the impact of different operational strategies • Analyses data using mathematical methodologies to predict different scenarios
Interact with others	2.4, 3.1, 4.5	• Collaborates with stakeholders to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion • Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to effectively present budgets
Get the work done	1.1, 2.1, 4.2, 4.5. 5.1-5.5	• Sequences and schedules complex operational cost-management activities, monitors implementation and manages relevant communication • Uses systematic, analytical processes in budget-monitoring and staff-compliance situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses formal analytical and lateral thinking techniques for identifying issues, generating and evaluating possible solutions to budget threats • Uses a range of digital applications to access,, extract, organise, integrate and share relevant budgetary or financial information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE608 Manage customer engagement operational costs	BSBCCO608B Manage customer contact operational costs	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

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

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Assessment Requirements for BSBCUE608 Manage customer engagement operational costs

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:

- analyse the fixed and variable costs of an operating customer engagement centre
- prepare, justify and present a budget
- communicate with stakeholders to obtain information and present and monitor the budget
- control and monitor the budget in compliance with regulations and financial control systems
- use and update the financial control system to ensure compliance.

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 accounting, benchmarking and budgeting principles
- outline cost-benefit analysis principles
- describe the financial delegation policy of organisation, financial control systems and requirements
- explain the organisational business objectives and goals, including operational and business planning
- outline risk assessment and management principles.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information and databases for analysis activities

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- relevant legislation, regulations, standards and guidelines
- financial control systems
- budget documentation and reporting
- 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

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BSBCUS201 Deliver a service to customers

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 deliver all 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.

It applies to individuals 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

Stakeholder Relations – Customer Service

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 contact with customers	1.1 Acknowledge and greet customer in a professional, courteous and concise manner according to organisational and legislative requirements 1.2 Maintain personal dress and presentation in line with organisational requirements 1.3 Communicate using appropriate interpersonal skills to facilitate accurate and relevant exchange of information

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Maintain sensitivity to customer specific needs and any cultural, family and individual differences 1.5 Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements
2 Identify customer needs	2.1 Use appropriate questioning and active listening to determine customer needs 2.2 Assess customer needs for urgency to identify priorities for service delivery 2.3 Provide customer with information about available options for meeting customer needs and assist customer to identify preferred option/s 2.4 Identify personal limitations in addressing customer needs and seek assistance from designated persons where required
3 Deliver service to customers	3.1 Provide prompt customer service to meet identified needs according to organisational requirements 3.2 Provide information regarding problems and delays, and follow-up within appropriate timeframes as necessary 3.3 Communicate with customers in a clear, concise and courteous manner 3.4 Identify opportunities to enhance the quality of service and products, and take action to improve the service whenever possible
4 Process customer feedback	4.1 Promptly recognise customer feedback and handle sensitively according to organisational and legislative requirements 4.2 Accurately record any feedback and communication between customers and the organisation according to organisational standards, policies and procedures and legislative requirements 4.3 Identify any unmet customer needs and discuss suitability of other products/services 4.4 Support customers to make contact with other services 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.

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 3.1, 4.1, 4.2, 4.4	• Understands requirements in organisational policy and procedure documents • Interprets product and service information in a range of formats to provide customer advice
Writing	4.2	• Records customer information according to organisational requirements
Oral Communication	1.1, 1.3, 1.4, 1.5, 2.1-2.4, 3.2, 3.3, 4.3	• Provides information or advice using structure and language to suit the audience • Asks questions and listens to gain information or confirm understanding
Navigate the world of work	1.1, 1.2, 3.1, 4.1, 4.2, 4.4	• Follows organisational procedures and practices relevant to own role
Interact with others	1.1, 1.3-1.5, 2.1-2.4, 3.1, 3.2, 3.3, 4.1, 4.3, 4.4	• 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 particular needs of others
Get the work done	3.2, 3.4, 4.1- 4.3	• Addresses routine problems in familiar work contexts • Recognises opportunities to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUS201 Deliver a service to customers	BSBCUS201B Deliver a service to customers	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

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Assessment Requirements for BSBCUS201 Deliver a service to customers

Modification History

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

Performance Evidence

Evidence of the ability to:

- greet customer and establish rapport/relationship in accordance with organisational requirements
- identify customer needs using appropriate interpersonal skills
- provide prompt service to address customer needs in accordance with organisational requirements
- 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.

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 briefly describe key provisions of relevant legislation from all forms of government that apply to provision of customer services
- identify and explain workplace organisational policies and procedures relating to customer service and the customer service process.

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:

- office equipment and technology
- workplace documents, organisational policies and procedures for customer service

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- examples of customer complaints and feedback
- 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

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BSBCUS301 Deliver and monitor a service to customers

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 customer needs, deliver and monitor customer service and identify improvements in the provision of customer service.

It applies to individuals who apply a broad range of competencies in various work contexts. In this role, individuals often exercise discretion and judgement using appropriate theoretical knowledge of customer service to 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

Stakeholder Relations – Customer Service

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 Identify customer needs	1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations 1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements 1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection

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ELEMENT	PERFORMANCE CRITERIA
	of preferred options 1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals
2 Deliver a service to customers	2.1 Provide prompt service to customers to meet identified needs in accordance with organisational and legislative requirements 2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery 2.3 Sensitively and courteously handle customer complaints in accordance with organisational and legislative requirements 2.4 Provide assistance or 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 Monitor and report on service delivery	3.1 Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements 3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational and legislative requirements 3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements 3.4 Regularly seek customer feedback and use to improve the provision of products and services 3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery

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, 2.4, 3.1, 3.5	• Comprehends textual information to determine customer service requirements • Proofreads texts for clarity of meaning and accuracy of grammar and punctuation

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Writing	2.3, 3.5	• Completes responses to customer complaints in required format • Prepares reports using sequencing, format and words to communicate recommendations clearly and effectively
Oral Communication	1.1, 1.3, 1.4, 2.2, 2.3, 2.4	• Provides information or advice using structure and language to suit the audience • Asks questions and listens to gain information or confirm understanding
Navigate the world of work	1.2, 2.1-2.4, 3.1, 3.2	• Recognises, understands and applies organisational policies and procedures relevant to role
Interact with others	1.1, 1.3, 1.4, 2.2, 2.3, 2.4, 3.4	• 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
Get the work done	1.2, 2.3, 2.5, 3.1-3.5	• Plans and implements systems to gather and organise information • Monitor actions and progress against goals and implements adjustments as appropriate • Uses problem-solving skills to analyse and respond to customer complaints or enquiries • Identifies and follows up on opportunities to improve work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUS301 Deliver and monitor a service to customers	BSBCUS301B Deliver and monitor a service to customers	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBCUS301 Deliver and monitor a service to customers

Modification History

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

Performance Evidence

Evidence of the ability to:

- use communication skills to establish rapport and build relationships with customers in accordance with organisational requirements
- identify customer needs using appropriate questioning and active listening skills
- provide customer service in accordance with organisational requirements
- respond to and record customer feedback and action taken according to organisational standards, policies and procedures
- produce a report which identifies and recommends ways to improve service delivery.

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:

- summarise key provisions of relevant legislation from all levels of government that may affect aspects of business operations
- explain organisational policy and procedures for customer service, including handling customer complaints
- provide examples of verifiable evidence that could be used to review customer satisfaction
- outline the interpersonal skills needed for serving customers, including customers with specific needs.

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:

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- office equipment and technology
- workplace documents, organisational policies and procedures for customer service
- examples of customer complaints and feedback
- 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

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BSBCUS401 Coordinate implementation of customer service strategies

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 advise, carry out and evaluate customer service strategies.

It applies to individuals who have well developed skills and a broad knowledge of customer service strategies for addressing customer needs and problems, and who 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

Stakeholder Relations – Customer Service

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 Advise on customer service needs	1.1 Clarify and accurately assess customer needs using appropriate communication techniques 1.2 Diagnose problems matching service delivery to customers and develop options for improved service within organisational requirements 1.3 Provide relevant and constructive advice to promote the improvement of customer service delivery

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Use business technology and/or online services to structure and present information on customer service needs
2 Support implementation of customer service strategies	2.1 Ensure customer service strategies and opportunities are promoted to designated individuals and groups 2.2 Identify and allocate available budget resources to fulfil customer service objectives 2.3 Promptly action procedures to resolve customer difficulties and complaints within organisational requirements 2.4 Ensure that decisions to implement strategies are taken in consultation with designated individuals and groups
3 Evaluate and report on customer service	3.1 Review client satisfaction with service delivery using verifiable data in accordance with organisational requirements 3.2 Identify and report changes necessary to maintain service standards to designated individuals and groups 3.3 Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of client service strategies 3.4 Maintain systems, records and reporting procedures to compare changes in 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	Performance Criteria	Description
Reading	1.2, 1.4, 2.3, 3.1	• Reviews textual information and comprehends details that relate to the interests or requirements of the client and organisation
Writing	1.4, 3.3, 3.4	• 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	1.1, 1.3, 2.1, 2.4, 3.2	• Uses pace, intonation, intelligible pronunciation and listening and questioning techniques to interact effectively with others

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Numeracy	2.2	• Recognises and interprets numerical information and performs calculations on familiar mathematical information
Navigate the world of work	1.2, 2.3, 3.1, 3.2	• Recognises and applies organisational protocols and meets expectations associated with own work
Interact with others	1.1, 1.3, 2.1, 2.4, 3.2, 3.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • 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
Get the work done	1.2, 1.4, 2.3, 3.1- 3.4	• Applies formal and logical processes when planning and implementing tasks • Applies standard procedures when responding to familiar problems within own work context • Uses digital technologies to access, organise, present and store information relevant to own role

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUS401 Coordinate implementation of customer service strategies	BSBCUS401B Coordinate implementation of customer service 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBCUS401 Coordinate implementation of customer service strategies

Modification History

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

Performance Evidence

Evidence of the ability to:

- identify the needs and priorities of the organisation in delivering services to customers
- diagnose problems in delivery of customer service
- 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.

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 the principles of customer service
- explain sources of information and techniques for identifying customer needs and reviewing customer satisfaction
- explain the organisational business structure, products and services related to customer service
- describe product and service standards and best practice models.

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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 customer service field of work and include access to:

- office equipment
- business technology
- organisational policies and procedures for customer service
- examples of customer complaints and feedback
- client satisfaction data
- 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

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BSBCUS402 Address customer needs

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 an ongoing relationship with a customer over a period of time. This includes helping customers articulate their needs and managing networks to ensure customer needs are addressed.

It applies to individuals who are expected to have detailed product knowledge in order to recommend customised solutions. In this role, individuals would be expected to apply organisational procedures and be aware of, and apply as appropriate, broader factors involving ethics, industry practice and relevant government policies and regulations.

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

Unit Sector

Stakeholder Relations – Customer Service

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 Assist customer to articulate needs	1.1 Ensure customer needs are fully explored, understood and agreed 1.2 Explain and match available services and products to customer needs 1.3 Identify and communicate rights and responsibilities of customers to the customer as appropriate

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ELEMENT	PERFORMANCE CRITERIA
2 Satisfy complex customer needs	2.1 Explain possibilities for meeting customer needs 2.2 Assist customers to evaluate service and/or product options to satisfy their needs 2.3 Determine and prioritise preferred actions 2.4 Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner
3 Manage networks to ensure customer needs are addressed	3.1 Establish effective regular communication with customers 3.2 Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organisation 3.3 Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer and the products and services available 3.4 Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services 3.5 Maintain records of customer interaction in accordance with 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 Criteria	Description
Reading	1.3, 2.2, 2.3, 2.4, 3.2, 3.3, 3.4, 3.5	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements
Writing	1.1, 3.1, 3.2, 3.3, 3.4, 3.5	• Prepares written reports, up-to-date procedures and other workplace documentation that communicate complex information clearly and effectively
Oral Communication	1.1, 1.2, 1.3, 2.1, 2.2, 3.1, 3.2	• Clearly articulates customer's needs using language suitable to diverse audiences and employs listening and questioning techniques to confirm understanding
Navigate the world of work	3.5	• Recognises and applies organisational protocols and meets expectations associated with own work

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Interact with others	1.1-1.3, 2.1, 2.2, 3.1, 3.2	• Selects and uses appropriate communication techniques to establish and maintain positive working relationships • Establishes connections and shares information with others who can contribute to effective work outcomes
Get the work done	2.3, 2.4, 3.3-3.5	• Develops and implements plans for routine and non-routine tasks recognising the importance of aligning goals and expectations to achieve outcomes • Recognises and takes responsibility for addressing predictable and non-predictable problems in own work context • Uses digital systems to organise and store information relevant to own work

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUS402 Address customer needs	BSBCUS402B Address customer needs	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

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Assessment Requirements for BSBCUS402 Address customer needs

Modification History

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

Performance Evidence

Evidence of the ability to:

- communicate effectively with customers including
  - helping customers to articulate their needs and evaluate options
  - explaining products/services and how they match customer needs
  - establishing regular communication
  - explaining customer rights and responsibilities
- address customer's needs
- use organisational procedures to document customer satisfaction
- develop and maintain networks to support meeting customer needs
- identify potential difficulties in meeting customer needs and taking appropriate 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:

- explain organisational procedures and standards for establishing and maintaining customer service relationships
- describe informed consent
- explain consumer rights and responsibilities
- describe ways to establish effective regular communication with customers
- outline details of products or services including with reference to:
  - possible alternative products and services
  - variations within a limited product and service range.

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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 customer service field of work and include access to:

- office equipment and resources
- business technology
- organisational policies, procedures, quality systems, manuals and guidelines for customer management
- examples of products/services and promotional strategies
- 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

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BSBCUS403 Implement customer service standards

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 contribute to quality customer service standards within an organisation.

It applies to individuals who may be frontline managers, team leaders or supervisors who have responsibility for ensuring that customer service systems and customer service standards are implemented.

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

Unit Sector

Stakeholder Relations – Customer Service

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 Contribute to quality customer service standards	1.1 Access, interpret, apply and monitor customer service standards in the workplace according to organisational standards, policies and procedures 1.2 Make contributions to the development, refinement and improvement of customer service standards, policies and processes
2 Implement customer service systems	2.1 Encourage all personnel to consistently implement customer service systems

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Review customer feedback in consultation with appropriate personnel and analyse when improving work practices 2.3 Identify customer service problems and make adjustments to ensure continued service quality 2.4 Communicate adjustments in service delivery to all those involved, within appropriate timeframes 2.5 Coordinate and manage delivery of services and products to ensure they effectively and efficiently meet agreed quality standards
3 Implement team customer service standards	3.1 Plan and implement team and work activities to meet customer needs and expectations, and to minimise inconvenience 3.2 Identify resources required to undertake team tasks while meeting required customer service levels

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, 2.5	• Interprets and monitors textual information obtained from a range of sources to determine how content may fulfil customer and organisational requirements
Writing	1.2, 2.3, 2.4	• Prepares written reports, up-to-date procedures and other workplace documentation that communicate information clearly and effectively
Oral Communication	2.1, 2.4	• Clearly articulates systems and standards in a team environment using language suitable to diverse audiences and employs listening and questioning techniques to confirm understanding
Navigate the world of work	1.1, 2.4, 2.5	• Recognises and applies organisational protocols and meets expectations associated with own work
Interact with others	1.2, 2.1-2.4	• Uses the communication channel, tone and vocabulary that is appropriate to the audience and specific purpose • Collaborates with others to achieve joint outcomes
Get the work done	2.2-2.5, 3.1, 3.2	• Plans a range of routine and non-routine tasks and implements actions in accordance with plan to meet desired outcomes

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		• Addresses problems using formal analytical thinking techniques to generate possible solutions, seeking input from others as required • Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUS403 Implement customer service standards	BSBCUS403B Implement customer service standards	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

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Assessment Requirements for BSBCUS403 Implement customer service standards

Modification History

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

Performance Evidence

Evidence of the ability to:

- access, interpret, apply and monitor customer service standards
- demonstrate compliance with customer service system and standards
- make contributions to improving or adapting customer service standards to better meet the needs of the organisation and the customers
- review and analyse customer feedback and make recommendations to address issues raised, including identifying the resources required
- make adjustments to improve customer service procedures including:
  - identifying and responding to problems
  - communicating with and encouraging staff
- coordinate and manage delivery of services and products to meet standards including:
  - planning and implementing team work activities
  - managing resources.

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:

- have detailed product / service knowledge
- explain the rights and responsibilities of customers and relevant consumer law
- outline models of customer service
- explain relevant organisational procedures and standards for customer service standards and relationships.

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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 customer service field of work and include access to:

- office equipment
- business technology
- workplace documents and policies and procedures
- customer feedback
- consumer protection laws and regulations
- 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

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BSBCUS501 Manage quality customer service

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 strategies to manage organisational systems that ensure products and services are delivered and maintained to standards agreed by the organisation.

It applies to individuals who supervise the provision of quality customer service within an organisation's procedures framework by others. 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

Stakeholder Relations – Customer Service

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 Plan to meet internal and external customer requirements	1.1 Investigate, identify, assess, and include the needs of customers in planning processes 1.2 Ensure plans achieve the quality, time and cost specifications agreed with customers
2 Ensure delivery of quality products and	2.1 Deliver products and services to customer specifications within

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ELEMENT	PERFORMANCE CRITERIA
services	organisation's business plan 2.2 Monitor team performance to consistently meet the organisation's quality and delivery standards 2.3 Help colleagues overcome difficulties in meeting customer service standards
3 Monitor, adjust and review customer service	3.1 Develop and use strategies to monitor progress in achieving product and/or service targets and standards 3.2 Develop and use strategies to obtain customer feedback to improve the provision of products and services 3.3 Develop, procure and use resources effectively to provide quality products and services to customers 3.4 Make decisions to overcome problems and to adapt customer services, products and service delivery in consultation with appropriate individuals and groups 3.5 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.1, 3.2, 3.3, 3.5	• 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	1.2, 3.1, 3.2, 3.3, 3.5	• Produces a range of text types to convey information, requirements or recommendations matching style of writing to purpose and audience
Oral Communication	1.1, 1.2, 2.1, 2.3, 3.2	• 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	1.2	• Interprets and comprehends mathematical information in organisation's business and customer service plans.

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Navigate the world of work	2.1, 2.2, 3.1, 3.5	• Recognises and applies organisational protocols and meets expectations associated with own work
Interact with others	1.1, 2.3, 3.4	• 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
Get the work done	1.1, 1.2, 2.1, 2.2, 3.1-3.5	• Develops and implements plans using logical processes and monitors and evaluates progress against stated goals • Accepts responsibility for addressing complex or non-routine difficulties, applying problem solving processes in determining a solution. • Uses digital technology to access, organise and present information in a format that meets requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCUS501 Manage quality customer service	BSBCUS501C Manage quality customer service	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

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Assessment Requirements for BSBCUS501 Manage quality customer service

Modification History

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

Performance Evidence

Evidence of the ability to:

- develop and manage organisational systems for quality customer service
- develop and review plans, policies and procedures for delivering and monitoring quality customer service
- implement policies and procedures to ensure quality customer service
- solve complex customer complaints and system problems that lead to poor customer service
- monitor and assist teams to meet customer service requirements
- develop, procure and use human and physical resources to support quality customer service delivery.

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 the legislative and regulatory context of the organisation relevant to customer service
- describe organisational policy and procedures for customer service including handling customer complaints
- identify service standards and best practice models
- summarise public relations and product promotion
- outline techniques for dealing with customers including customers with specific needs
- explain techniques for solving complaints including the principles and techniques involved in the management and organisation of:
  - customer behaviour
  - customer needs research

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- customer relations
- ongoing product and/or 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

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 customer service field of work and include access to:

- legislation, regulations and codes of practice related to customer service
- business technology
- workplace documentation and resources
- complex customer complaints
- 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

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BSBDES201 Follow a design process

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 follow a design process at a basic level, incorporating an element of problem solving to identify and resolve challenges that may hinder the process.

It applies to individuals who work under direct supervision and respond to specific issues or changes which may relate to product and service requirements.

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

Unit Sector

Design – Design Process

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 Clarify the challenge	1.1 Confirm the nature and scope of the challenge with stakeholders 1.2 Agree on specific objectives with stakeholders 1.3 Identify constraints that may impact the design process 1.4 Identify and source relevant supporting information and assistance
2 Explore different ideas	2.1 Generate a range of ideas to respond to the challenge

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ELEMENT	PERFORMANCE CRITERIA
and solutions	2.2 Explore different options and ideas for meeting objectives 2.3 Involve others in the process of developing ideas and solutions
3 Select and present a solution	3.1 Reflect on different ideas and feedback, and select a preferred solution 3.2 Summarise the key ideas in the solution and present to stakeholders in appropriate format 3.3 Obtain any required approvals to take the solution to the next stage
4 Implement solution	4.1 Schedule key tasks and organise resources to support implementation 4.2 Carry out testing, prototyping or trialling of the proposed solution 4.3 Maintain any required documentation 4.4 Identify problems and seek advice and guidance from others
5 Evaluate solution	5.1 Check success of the solution based on original objectives 5.2 Seek feedback from appropriate stakeholders 5.3 Review both the solution and the process undertaken to develop the solution as part of an ongoing learning 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
Learning	5.3	• Reviews own work to identify improvement opportunities
Reading	1.4, 2.2, 4.3	• Reviews and interprets textual information from a range of sources to scope job requirements and generate ideas
Writing	3.2, 4.3	• Produces meeting summaries using simple language and structure
Oral Communication	1.1, 1.2, 2.3, 3.2, 4.4	• Uses questioning and listening techniques to gain information, confirm understanding or seek feedback

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		• Presents ideas using correct pronunciation and vocabulary
Numeracy	4.1	• Recognises and interprets numerical information relating to timeframes and dates
Interact with others	5.2	• Cooperates with others to achieve results in immediate work context
Get the work done	1.3, 1.4, 2.1, 2.2, 3.1, 3.3, 4.1, 4.2, 4.4, 5.1	• Plans routine tasks with familiar goals and outcomes • Seeks assistance when problems are beyond immediate responsibilities or experience • Takes responsibility for routine low-impact decisions within familiar situations • May reflect on outcomes and identify what worked, or develop an improved approach for future situations • Identifies ideas in use in other contexts and considers how they might be applied in own context with minimal adjustment

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES201 Follow a design process	BSBDES201A Follow a design process	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

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Assessment Requirements for BSBDES201 Follow a design process

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:

- determine project objectives, possible constraints and required support materials
- collaborate with others when generating ideas, solving problems, and seeking approvals and feedback
- schedule tasks and create project documentation to support proposed solutions
- review work to determine future 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:

- describe creative thinking techniques that can be used to generate ideas
- summarise the key steps in the design process as a way of thinking and solving problems
- list potential sources of information for new ideas, relevant to specific context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to office equipment required to implement solutions.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBDES202 Evaluate the nature of design in a specific industry context

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 examine and consider the design process in a particular industry.

It applies to individuals working in any context, who need to develop a basic appreciation and knowledge of the way design works in a particular industry, and of its potential impacts on industry and individual work practice.

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

Unit Sector

Design – Design Process

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 Source information on design in given industry context	1.1 Investigate the nature, history, role and importance of design in the industry 1.2 Evaluate roles played by designers and other contributors in design process 1.3 Source information on impact of technology on design in the industry

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ELEMENT	PERFORMANCE CRITERIA
2 Examine links between design and own work	2.1 Investigate impact of design on own work 2.2 Consider role of individual workers across the industry in affecting future design directions
3 Keep up-to-date with industry design trends	3.1 Identify and access opportunities to maintain currency of knowledge about industry design trends 3.2 Evaluate how design trends affect the overall industry and how it operates 3.3 Share information and proactively discuss emerging trends with work colleagues 3.4 Identify trends that will impact on own work and seek opportunities to develop appropriate skills

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	3.1, 3.4	• Identifies and uses opportunities to maintain and improve skills and knowledge
Reading	1.1, 1.3, 3.1	• Reviews textual information from a range of sources to identify relevant information
Writing	3.3	• Prepares specific information using clear and appropriate language to present to other personnel
Oral Communication	3.3	• Participates in verbal exchanges using vocabulary, style and tone appropriate to audience • Uses listening techniques to clarify understanding
Interact with others	3.3	• Collaborates with others to achieve shared goals
Get the work done	1.1-1.3, 2.1, 2.2, 3.2, 3.4	• Plans routine tasks with familiar goals and outcomes • Takes responsibility for routine low-impact decisions within familiar situations • Identifies ideas in use in other contexts and considers how they might be applied in own context with minimal adjustment • Recognises and applies some general design and

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		operating principles of digital tools to inform design work

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES202 Evaluate the nature of design in a specific industry context	BSBDES202A Evaluate the nature of design in a specific industry context	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

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Assessment Requirements for BSBDES202 Evaluate the nature of design in a specific industry context

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 and interpret a range of information sources on design and apply concepts to own work
- seek opportunities to maintain currency of industry trends and design skills and share information with colleagues.

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:

- investigate and explain consumer/end-user expectations
- explain current and emerging technologies and their effects on design in the industry
- identify influential designers, both past and present
- describe major design trends in the industry
- explain and describe the role of design in a given industry context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- office equipment and resources
- sources of information on design in a specific industry context.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBDES301 Explore the use of colour

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 explore the use of colour and to apply colour theory.

It applies to individuals whose work involves understanding and applying the effective use of colour.

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

Unit Sector

Design – Design Process

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 Source information on colour and colour theory	1.1 Identify and access sources of information on colour and colour theory 1.2 Evaluate and collate information to build knowledge of colour and its application in different contexts
2 Experiment with colour	2.1 Test different colours and colour-combinations through experimentation 2.2 Use own ideas as a way of testing, challenging or confirming colour theory

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Ensure safe use of materials, tools and equipment during experimentation with colour
3 Communicate concepts and ideas through use of colour	3.1 Investigate how colour might be used to communicate a particular idea or concept 3.2 Select materials, tools and equipment relevant to the idea or concept 3.3 Apply colour to communicate the concept or idea based on own knowledge of colour and colour theory 3.4 Review and reflect on own use of colour and what it communicates 3.5 Seek and obtain feedback from others about the way colour has been used and its success in communicating the concept or idea 3.6 Present and store work any samples in a way which takes account of the need for professional presentation and potential relevance for future work

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, 2.3, 3.1	• Evaluates and integrates facts and descriptions of colour from a range of texts including text embedded in visual media
Writing	1.2, 3.6	• Produces a range of text types using appropriate vocabulary, grammatical structure and conventions • Applies basic referencing and sequencing of professional and archival resources
Oral Communication	1.1, 3.5	• Presents ideas, asks questions and listens, to seek feedback or generate ideas
Numeracy	2.1	• Selects and uses mathematical information for measurement and volume
Navigate the world of work	2.3	• Takes some personal responsibility for adherence to legal and regulatory requirements with specific reference to safety

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Get the work done	1.1, 1.2, 2.1, 2.2, 3.1-3.4, 3.6	• Plans, sequences and implements tasks required to achieve outcomes • Takes responsibility for routine low-impact decisions within familiar situations • Evaluates effectiveness of decisions on how well they meet stated goals • Contributes to the design of new approaches within immediate work environment • Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES301 Explore the use of colour	BSBDES301A Explore the use of colour	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

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Assessment Requirements for BSBDES301 Explore the use of colour

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:

- research information on colour and colour theory to inform work
- experiment with different colours and techniques to communicate a concept or idea
- review completed work and present and store samples for future reference.

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 colour attributes and colour relationships
- describe and interpret different colour theories and their applications in different contexts
- describe individual interpretation and choice in relation to the use of colour, and the potential limitations of theory
- identify different materials, tools and equipment required to experiment with colour
- describe ways other practitioners use colour in their work.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- office equipment and resources
- materials, resources and equipment needed to apply colour in the relevant work context.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBDES302 Explore and apply the creative design process to 2D forms

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 explore and creatively apply the design process to the development of two-dimensional (2D) forms.

It applies to individuals who apply the creative design process to the development of 2D forms. The unit underpins many other specialised design units.

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

Unit Sector

Design – Design Process

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 Source information on 2D design	1.1 Identify and access relevant sources of information on 2D design 1.2 Evaluate and collate information to build knowledge of 2D design
2 Explore the creative design process for 2D forms	2.1 Use creative thinking techniques to generate a range of ideas and options 2.2 Use experimentation to explore and challenge a range of

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ELEMENT	PERFORMANCE CRITERIA
	different ideas 2.3 Challenge assumptions, reflect on ideas and refine approaches 2.4 Consciously change perspective, and evaluate ideas and situations in new ways
3 Communicate concepts or ideas through application of design processes to 2D forms	3.1 Investigate and reflect on how a particular concept or idea might be communicated in 2D 3.2 Select materials, tools and equipment relevant to the realisation of the concept or idea 3.3 Apply a creative design process to produce a range of 2D concept realisations 3.4 Reflect on own application of design process and success in communicating the concept or idea 3.5 Seek and obtain feedback from others about the 2D form and its success in communicating the concept or idea 3.6 Present and store concept realisations or samples in a format which takes account of the need for professional presentation and the work's potential value for future jobs

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	• Interprets textual information from relevant sources to determine and adhere to requirements
Writing	2.1, 3.6	• Produces a range of text types using appropriate vocabulary, grammatical structure and referencing conventions
Oral Communication	2.1, 2.2, 2.3, 3.5	• Participates in verbal exchanges using vocabulary, style and tone appropriate to audience • Uses listening techniques to clarify understanding
Numeracy	3.1, 3.3, 3.5	• Performs mathematical calculations to produce 2D designs
Get the work done	1.1, 1.2, 2.1-2.4, 3.1-3.4, 3.6	• Plans and organises tasks required to achieve required outcomes

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		• Identifies ideas in use in other contexts and considers how they might be applied in own context • Selects new ideas that may improve a process in immediate work context • Takes responsibility for routine low-impact decisions within familiar situations • Evaluates effectiveness of decisions on how well they meet stated goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES302 Explore and apply the creative design process to 2D forms	BSBDES302A Explore and apply the creative design process to 2D forms	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

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Assessment Requirements for BSBDES302 Explore and apply the creative design process to 2D forms

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:

- produce a range of samples or concept realisations which demonstrate creative thinking techniques and experimentation processes based on available resource materials
- review own work to determine future 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:

- identify creative thinking techniques that can be used as part of the design process
- describe the elements and principles of design as applied to two-dimensional (2D) forms
- list materials, tools and equipment required for the design of 2D forms in the relevant work context
- describe the notion of individual interpretation and choice within the design process
- explain the particular challenges that may arise in the design of 2D forms.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to the materials, resources and equipment needed to apply design processes to 2D forms.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBDES303 Explore and apply the creative design process to 3D forms

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 explore and creatively apply the design process to the development of three-dimensional (3D) forms.

It applies to individuals who work under supervision and apply an understanding of the design process using discretion and judgement.

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

Unit Sector

Design – Design Process

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 Source information on 3D design	1.1 Identify and access relevant sources of information on 3D design 1.2 Evaluate and collate information to build knowledge of 3D design
2 Explore the creative design process for 3D forms	2.1 Use creative thinking techniques to generate a range of ideas and options 2.2 Use experimentation to explore and challenge a range of

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ELEMENT	PERFORMANCE CRITERIA
	different ideas 2.3 Challenge assumptions, reflect on ideas and refine approaches 2.4 Consciously change perspective, and evaluate ideas and situations in new ways
3 Communicate concepts or ideas through application of design processes to 3D forms	3.1 Investigate and reflect on how a particular concept or idea might be communicated in 3D form 3.2 Select materials, tools and equipment relevant to the realisation of the concept or idea 3.3 Apply a creative design process to produce a range of 3D concept realisations 3.4 Reflect on own application of design process and success in communicating the concept or idea 3.5 Seek and obtain feedback from others about the 3D form and its success in communicating the concept or idea 3.6 Present and store concept realisations or samples in a format which takes account of the need for professional presentation and the work's potential value for future jobs

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	• Interprets textual information from relevant sources to determine and adhere to requirements
Writing	2.1, 3.6	• Produces a range of text types using appropriate vocabulary, grammatical structure and referencing conventions
Oral Communication	2.1-2.3, 3.5	• Participates in verbal exchanges using vocabulary, style and tone appropriate to audience • Uses listening techniques to clarify understanding
Numeracy	3.1, 3.3, 3.5	• Performs mathematical calculations required to produce 3D concept designs
Get the work done	1.1, 1.2, 2.1-2.4, 3.1-3.4, 3.6	• Plans and organises tasks required to achieve outcomes • Identifies ideas in use in other contexts and considers

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		how they might be applied in own context • Selects and adopts new ideas to improve a process in immediate work context • Takes responsibility for routine low-impact decisions within familiar situations • Evaluates effectiveness of decisions on how well they meet stated goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES303 Explore and apply the creative design process to 3D forms	BSBDES303A Explore and apply the creative design process to 3D forms	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

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Assessment Requirements for BSBDES303 Explore and apply the creative design process to 3D forms

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:

- produce a range of samples or concept realisations which demonstrate creative thinking techniques and experimentation processes based on available resource materials for three-dimensional (3D) forms
- review own work to determine future 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:

- identify creative thinking techniques that can be used as part of the design process
- describe the elements and principles of design as applied to 3D forms
- list materials, tools and equipment required for the design of 3D forms in the relevant work context
- describe the notion of individual interpretation and choice within the design process
- explain the particular challenges and issues in the design of 3D forms
- outline the relationships between form and space.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to the materials, resources and equipment needed to apply design processes to 3D forms.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBDES304 Source and apply design industry knowledge

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 source, apply and update general knowledge of the design industry based on problem solving, aesthetics, materials and processes appropriately used within the design industry.

It applies to individuals who work under supervision and support the professional design process such as evaluating the nature of design.

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

Unit Sector

Design – Design Process

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 Source and apply information on the structure and operation of design industry	1.1 Identify and access information on the design industry and professional design practice 1.2 Use and analyse knowledge of the design industry appropriately, to inform own design practice and work
2 Source and apply knowledge on employment obligations and opportunities	2.1 Obtain information on employment obligations and opportunities in the design industry 2.2 Apply knowledge of employment obligations and opportunities

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ELEMENT	PERFORMANCE CRITERIA
impacting designers	appropriately within day-to-day work activities
3 Seek information on new design technology	3.1 Correctly identify sources of information on new technology affecting different areas of design practice 3.2 Investigate relevant technologies to assist effective work performance
4 Update industry knowledge	4.1 Identify and use a range of opportunities to update knowledge of the design industry and monitor current issues of concern to the industry 4.2 Share updated knowledge with colleagues and peer group as appropriate, and incorporate into day-to-day work activities
5 Apply information on ethical and legal work practices	5.1 Source information on ethical and legal work practices in the context of design 5.2 Share updated knowledge on ethical and legal work practice in day-to-day work activities

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, 3.1, 3.2, 4.1, 5.1	• Evaluates a variety of texts to determine legislative and regulatory requirements, and current industry practices
Writing	4.1, 4.2, 5.2	• Produces a range of text types using appropriate vocabulary, grammatical structure and referencing conventions
Oral Communication	4.2, 5.2	• Presents information using vocabulary, style and tone appropriate to audience
Numeracy	1.2	• Identifies and comprehends numerical information in a range of familiar texts
Navigate the world of work	2.1, 2.2, 5.1, 5.2	• Takes some personal responsibility for adherence to legal, ethical and regulatory requirements
Get the work	1.1, 1.2, 3.1, 3.2	• Plans and organises tasks required to achieve required outcomes

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done		• Contributes to the design of new approaches within immediate work environment • Takes responsibility for routine low-impact decisions within familiar situations • Uses common digital systems and tools to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES304 Source and apply design industry knowledge	BSBDES304A Source and apply design industry knowledge	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

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Assessment Requirements for BSBDES304 Source and apply design industry knowledge

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:

- source and use a broad body of information to inform own professional practice
- work collaboratively with peers through open information-sharing processes and use of industry terminology
- investigate new technologies and how they can affect and assist design output
- Identify and participate in activities to maintain currency in design industry trends and practices.

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 the history and evolution of the design industry
- explain the relationship between design and allied industries design industry
- describe the impact of legislation, including intellectual property, on the design industry
- explain the relevance of ethical work practices to the design industry
- describe current and emerging technologies used within the design industry
- explain the obligations of employers and employees in the design industry
- outline key organisations that may provide advice or information about the design industry
- identify sources of information on the design industry and ways of maintaining current industry knowledge.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to sources of information on the design industry.

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

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BSBDES305 Source and apply information on the history and theory of design

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 source information on design history and theory, and to apply that information in the individual's design work.

It applies to individuals who work in design and need to develop and maintain a general knowledge of design history and theory.

More complex research into design theory and design trends is covered by BSBDES602 Research global design trends and BSBDES801 Research and apply design theory.

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

Unit Sector

Design – Design Process

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 Collect information on design history and theory	1.1 Identify and access relevant sources of information on design history and theory 1.2 Organise research material and findings for current or future use in design practice, facilitating easy access and

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ELEMENT	PERFORMANCE CRITERIA
	cross-referencing
2 Apply information to own area of work	2.1 Evaluate information in the context of current design practice 2.2 Assess which aspects of information on design history and theory could be used or adapted to inform current practice 2.3 Use relevant information in a culturally appropriate way to develop an understanding of own area of work
3 Update and maintain knowledge of design trends	3.1 Identify and use opportunities to update and expand knowledge of design trends and developments 3.2 Incorporate and integrate knowledge into design activities

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, 3.1	• Identifies, interprets and evaluates information on historical and current design trends from a range of sources
Writing	1.2, 3.1	• Notes findings and sources of information for design knowledge, trends and developments • Documents information for colleagues and peers as requested
Oral Communication	1.1, 3.1	• Asks questions to clarify information, listens to responses and shares ideas with others
Navigate the world of work	2.3	• Understands main tasks, responsibilities and boundaries of own role
Get the work done	1.1, 1.2, 2.2, 3.2	• Plans and implements tasks required to achieve required outcomes • Contributes to new approaches within immediate work environment • Takes responsibility for routine low-impact decisions within familiar situations • Follows routine procedures for using digital technology to enter, store and retrieve information

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		directly relevant to role

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES305 Source and apply information on the history and theory of design	BSBDES305A Source and apply information on the history and theory of design	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

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Assessment Requirements for BSBDES305 Source and apply information on the history and theory of design

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:

- show how the history and theory of design can be adapted and used in own professional practice
- maintain currency of theoretical and design knowledge.

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:

- summarise current design trends
- describe the evolution of design
- identify the organisational information practices and their application
- outline sources of information on design history and theory relevant to own design work.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to information sources on design history and theory.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBDES401 Generate design solutions

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 generate design solutions in response to a particular design need.

It applies to individuals who generate concepts and solutions in response to a design challenge in any industry context. The starting point may be an open or closed brief; a spontaneous idea; modification of an existing product, service, process or system; or a point in an ongoing design process.

This unit builds on BSBDES201 Follow a design process, and places greater focus on research, concept generation and collaboration with others as key aspects of the design process.

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

Unit Sector

Design – Design Process

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 Define the design challenge	1.1 Determine and evaluate user/client needs 1.2 Clarify specifications, parameters and constraints of the

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ELEMENT	PERFORMANCE CRITERIA
	design challenge in consultation with relevant stakeholders 1.3 Articulate essence of the design challenge in an appropriate format
2 Undertake research to inform the design solution	2.1 Source, evaluate and acknowledge information that may assist in responding to the design challenge 2.2 Consider historical, current and future perspectives and trends that might inform design solutions 2.3 Consider relevant social, economic, environmental, ethical and cultural issues that may impact design solutions 2.4 Analyse, distil and collate information to inform the development of the design solution
3 Communicate and collaborate with others	3.1 Establish and develop working relationships with key stakeholders 3.2 Seek and integrate input and ideas from others during design process 3.3 Inform key stakeholders about progress of the design and related implications 3.4 Negotiate and agree on any changed requirements or modifications
4 Generate ideas and responses to the design challenge	4.1 Reflect on and integrate ideas generated from research and consultation 4.2 Use a range of creative thinking techniques to generate different options and ideas 4.3 Apply relevant principles of functionality, ergonomics, aesthetics and sustainability to development of different options
5 Select a design solution	5.1 Develop and use a range of criteria to evaluate different options and ideas 5.2 Select a preferred solution based on agreed criteria and in consultation with relevant key stakeholders 5.3 Adjust and refine proposed design solution based on research, testing and reflection 5.4 Present proposed design solution with appropriate supporting documentation according to project requirements

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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, 2.4	• Researches, collates and analyses textual information from a wide range of sources
Writing	1.2, 1.3, 2.1, 2.4, 5.1, 5.3, 5.4	• Documents ideas, sources and concepts using appropriate formats and specific language • Refines and edits work
Oral Communication	1.2, 1.3, 3.2-3.4, 5.2, 5.4	• Actively participates in verbal exchanges of ideas and elicits views and opinions of others by listening and questioning • Clarifies, explains or presents information relating to design solution using clear and specific language appropriate to audience
Numeracy	1.3, 4.3, 5.1, 5.4	• Interprets numeric data and applies mathematical calculations relevant to design solution
Navigate the world of work	2.3	• 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	1.3, 3.1, 5.4	• 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	1.1, 2.1, 2.2, 2.4, 4.1-4.3, 5.1-5.3	• Takes responsibility for planning and implementing tasks required to achieve outcomes, including those times when interaction with others is • Systematically analyses and evaluates information to aid in decision making and problem solving • Applies some basic principles of lateral thinking to generate new or innovative ideas

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDES401 Generate design solutions	BSBDES401A Generate design solutions	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

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Assessment Requirements for BSBDES401 Generate design solutions

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 a design solution through research, reflection, and generation and refinement of ideas
- demonstrate effective collaboration with others in the design process.

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 elements and principles of design and their application in the relevant design context
- describe key features of the wider industry, and the economic, social and historical context design solutions are being generated in
- discuss design trends and technologies including other designs and the work of other design practitioners in the relevant industry context
- identify sources of information that support the development of technical and other knowledge
- describe the materials, tools, equipment, techniques and processes used in the generation of design solutions in the relevant industry context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- interaction with others to reflect the collaborative nature of the design process

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- sources of information on design for the relevant industry context.

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

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BSBDES402 Interpret and respond to a design brief

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 interpret and creatively respond to a design brief through the production of work.

It applies to individuals working in any industry or design context where work is prescribed by a commissioning agent/client in a brief. Individuals are required to integrate the creative, communication and planning processes that support effective response to a design brief.

Work is carried out independently, although guidance is available if required.

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

Unit Sector

Design – Design Process

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 Interpret design brief	1.1 Correctly interpret the specifications of design brief 1.2 Establish and clarify user or client for the proposed product/service to inform design decisions 1.3 Identify and clarify specifications, parameters or constraints of design brief in consultation with relevant colleagues

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Source and evaluate information pertinent to design brief
2 Explore and develop design concept	2.1 Generate ideas for design concept through research, exploration and experimentation 2.2 Develop initial design concept consistent with design brief parameters 2.3 Evaluate and explore options for refining concept to best meet design brief parameters 2.4 Refine options and select approach which best meets design brief requirements
3 Liaise with client	3.1 Agree on communication process and frequency of communication with client 3.2 Present concepts for work at appropriate stages during design process as required 3.3 Present and explore different options and creative ideas with client when appropriate 3.4 Proactively seek and act on client feedback 3.5 Reach agreement on concept for work which complies with design brief
4 Plan production of work	4.1 Assess specific design production risks 4.2 Identify all components required to produce a prototype 4.3 Assess technical requirements for production against specified guidelines 4.4 Identify and consult with support services required for production 4.5 Produce a prototype and evaluate against design brief requirements 4.6 Analyse prototype and determine any further adjustments to production requirements 4.7 Finalise production specifications supported by accurate and complete documentation
5 Complete production of work	5.1 Collect and/or organise required components for the work 5.2 Produce or monitor the production of work ensuring all parameters of design brief are met 5.3 Accurately document work progress in a format appropriate to the nature of the design and requirements of design brief

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Seek client approval for work 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	1.1, 1.3, 1.4, 2.1, 4.3, 4.5	• Analyses textual information to accurately interpret job specifications
Writing	1.3, 3.2-3.5, 4.4, 4.5, 4.7, 5.3, 5.4	• Uses specific industry-related terminology and appropriate formats to develop, document and amend workplace documentation
Oral Communication	1.3, 3.1-3.5, 4.4, 5.4	• Actively participates in verbal exchanges of ideas and elicits the views and opinions of others by listening and questioning • Uses clear language to clarify, explain and present information
Numeracy	1.1, 1.3, 4.5, 5.3	• Interprets numeric data and applies mathematical calculations to produce prototype according to design specification
Interact with others	1.3, 3.1-3.5, 4.4, 5.4	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Collaborates and negotiates with others to achieve joint outcomes
Get the work done	1.1, 1.2, 2.1-2.4, 3.2, 4.1-4.3, 4.6, 4.7, 5.1, 5.2	• Takes responsibility for planning and implementing tasks required to achieve outcomes, including those times when interaction with others is • Systematically analyses and evaluates information to aid in decision making and problem solving • Applies some basic principles of lateral thinking to generate new or innovative ideas • Understands and explicitly applies some basic principles of lateral thinking to generate new or innovative ideas

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDES402 Interpret and respond to a design brief	BSBDES402A Interpret and respond to a design brief	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

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Assessment Requirements for BSBDES402 Interpret and respond to a design brief

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:

- articulate and document the process of developing own design practice by learning to develop new skills, ideas and a unique voice
- adjust work processes via peer feedback and self-evaluation
- identify work options and incorporate networking in career development.

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:

- list current and emerging designers in the relevant design discipline
- discuss current and emerging trends and technologies in the relevant design discipline, and the opportunities and challenges they represent
- identify professional development information and resources available to designers
- summarise sources of information relating to work opportunities and career planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to materials, resources and equipment used in the development of technical and conceptual skills in the relevant design context.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBDES403 Develop and extend design skills and practice

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 extend skills as a practising designer.

It applies to individuals who work as a designer, in any industry context, either independently or employed by an organisation.

Designers must continually refine, develop and evaluate their own conceptual and technical skills. Research, experimentation and collaboration are key factors in this process.

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

Unit Sector

Design – Design Process

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 Acquire and develop technical skills	1.1 Plan strategies to ensure the development of appropriate technical skills in design practice 1.2 Plan and use opportunities to develop and assess technical skills 1.3 Identify and use practice, feedback, discussion and evaluation

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ELEMENT	PERFORMANCE CRITERIA
	opportunities to continuously improve technical skills 1.4 Develop and extend technical skills through testing capabilities of materials, tools and equipment 1.5 Identify and use relevant media to stimulate technical and professional development
2 Develop conceptual skills and ideas	2.1 Engage in ongoing experimentation and exploration of different ideas and techniques 2.2 Discuss ideas with others and apply knowledge gained to inform own work 2.3 Use work practice to gain experience in a range of genres and interpretations 2.4 Study the work of others to stimulate conceptual and technical skills development 2.5 Research and share ideas across a range of design disciplines 2.6 Identify and use a range of opportunities to develop own skills and keep informed about current design practice
3 Develop own voice	3.1 Explore and experiment with new ideas in making and/or interpreting design work 3.2 Explore and use technology, where appropriate, to develop own voice and expand practice 3.3 Demonstrate own voice through design project realisation implementation
4 Evaluate own work	4.1 Seek and apply constructive criticism from others to improve own work 4.2 Evaluate own work against planned strategy for own practice 4.3 Evaluate own work in the context of work by others to extend own practice 4.4 Adjust work processes and practice as necessary to improve technical, conceptual and commercial outcomes
5 Research work opportunities	5.1 Correctly identify sources of information relating to work opportunities for designers 5.2 Identify networks and promotional opportunities for designers which may be helpful in developing career opportunities 5.3 Incorporate research results and information into own work and career planning

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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	1.1-1.5, 2.2, 2.4, 2.6, 3.2, 4.1-4.3	• Uses practical strategies to identify and implement improvements in own creative skills and technical design skills and practice
Reading	1.5, 2.4, 2.5, 5.1-5.3	• Researches and evaluates a variety of textual information from a wide range of sources
Writing	2.5, 4.1, 5.3	• Uses clear and specific language to document ideas, feedback and research results
Oral Communication	1.3, 2.2, 2.5, 4.1	• Participates in a range of verbal exchanges and presentations using appropriate tone and vocabulary to suit the audience • Uses active listening and questioning techniques to clarify and confirm understanding
Navigate the world of work	1.2, 1.3, 2.3, 4.1, 5.2	• Recognises the importance of developing technical skills and of learning from feedback and self-reflection • Begins to broaden areas of interest and focus, seeking new challenges and recognising that expertise can be adapted and applied in diverse contexts
Interact with others	2.5, 4.1, 5.2	• Begins to cultivate relationships with people with the knowledge, skills and influence to provide collaborative support
Get the work done	1.1, 1.2, 1.4, 1.5, 2.1, 2.3, 2.6, 3.1-3.3, 4.2, 4.4, 5.1	• Takes responsibility for planning and implementing tasks required to achieve outcomes, including those times when interaction with others is • Systematically analyses and evaluates information to aid in decision making and problem solving • Applies some basic principles of lateral thinking to generate new or innovative ideas • Recognises the potential of new approaches to enhance work practices and outcomes • Evaluates effectiveness of decisions on how well they meet stated goals • Understands key principles and concepts underpinning the design and operation of digital systems and applies these when seeking to understand the potential of new technology

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDES403 Develop and extend design skills and practice	BSBDES403A Develop and extend design skills and 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBDES403 Develop and extend design skills and practice

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:

- use strategies to develop or extend skills, ideas and a unique voice
- adjust work processes as a result of peer feedback and self-evaluation
- research work options, networking and promotional opportunities and incorporate information into own work and career development.

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:

- list current and emerging designers in the relevant design discipline
- discuss current and emerging trends and technologies in the relevant design discipline, and the opportunities and challenges they represent
- identify professional development information and resources available to designers
- summarise sources of information relating to work opportunities and career planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to materials, resources and equipment used in the development of technical and conceptual skills in the relevant design context.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBDES501 Implement design solutions

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 take a design concept or solution to the implementation stage. The outcome of work could be a completed product, object, system or service, but is more likely to be a complete or partial prototype or model for the design. The focus of the unit is on a general knowledge of design techniques and processes, and practical application to a specific design context.

It applies to individuals who implement concepts and solutions in response to a design challenge in any industry context.

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

Unit Sector

Design – Design Process

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 Organise resources for realising the design solution	1.1 Confirm the nature and scope of the proposed design solution 1.2 Research resources required for developing the design concept to implementation stage 1.3 Investigate different factors impacting the selection and use of resources 1.4 Select and prepare resources based on research and other

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ELEMENT	PERFORMANCE CRITERIA
	legislative or organisational requirements
2 Test the design solution	2.1 Experiment with a range of different techniques and processes to test the design solution 2.2 Evaluate, challenge and refine testing processes 2.3 Gain input and feedback from key stakeholders during testing 2.4 Accurately document outcomes of testing 2.5 Select final design solution based on outcomes of testing and input from others
3 Develop prototype or model	3.1 Create prototype or model based on agreed approaches 3.2 Select and organise materials, tools and equipment, where appropriate, according to chosen design solution 3.3 Expose model or prototype to quality checks and ongoing analysis, enhancement and refinement 3.4 Compare completed prototype or model against identified needs and other considerations and make adjustments as required
4 Present prototype or model	4.1 Identify key stakeholders design should be presented to 4.2 Select appropriate format for presentation based on nature of audience and design 4.3 Present prototype or model to optimise clarity, conciseness and appeal

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, 3.4	• Researches and accurately interprets textual information from a wide range of sources
Writing	1.2, 1.3, 2.3, 2.4, 3.4, 4.3	• Documents research, resource requirements and testing outcomes using appropriate language and formats
Oral Communication	1.1, 2.3, 4.3	• Participates in a range of verbal exchanges and presentations using appropriate tone and vocabulary to suit audience

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		• Uses active listening and questioning techniques to gain input and feedback
Numeracy	1.1-1.3, 2.4, 2.5	• Interprets and applies numeric information relevant to design solution • Compares numerical data gathered from testing
Navigate the world of work	1.4	• Understands and adheres to organisational policies, procedures and legislative requirements during planning and implementation of design solution
Interact with others	4.3	• 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	1.1-1.4, 2.1, 2.2, 2.5, 3.1-3.4, 4.1, 4.2	• Sequences and schedules routine and complex activities, monitors implementation, and manages relevant communication • Applies formal problem-solving processes when responding to unpredictable issues and challenges that arise during the testing process • Makes a range of critical and non-critical decisions in relatively complex situations, taking client requirements and range of constraints into account • Creates new or innovative ideas through exploration, analysis and critical thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES501 Implement design solutions	BSBDES501A Implement design solutions	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

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Assessment Requirements for BSBDES501 Implement design solutions

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 critical analysis, testing and development of a model, prototype or aspect of a design solution to meet an identified need
- present model to key stakeholders using the most appropriate best practice methods.

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 elements and principles of design and their application in relevant design context
- describe key features of the wider industry, with the economic, social and historical context for the design solution
- discuss design trends and technologies including other designs and the work of other design practitioners in the relevant context
- summarise sources of information that support the development of technical and other knowledge
- describe the technical expertise, resources, materials, tools, equipment, techniques and industry processes required for the area the design solutions are being implemented in.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- other people to reflect the collaborative nature of the design process

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- resources required to test a design solution in a given industry context including materials, tools, equipment and expertise.

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

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BSBDES502 Establish, negotiate and refine a design brief

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 proactively with a client or commissioning organisation to develop and negotiate a design brief.

It applies to individuals working in any industry or design context where the designer plays a key role in determining the scope and nature of work required. Establishment, negotiation and refinement of a design brief requires the integration of highly-developed creative thinking, communication and planning skills in a process that may not be linear. Adaptability and effective responses to change and new ideas are crucial.

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

Unit Sector

Design – Design Process

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 design requirements	1.1 Identify and make appropriate contact with relevant stakeholders for the design project, in addition to the client 1.2 Identify and source information and references relevant to the design project 1.3 Undertake critical analysis of sources and extract key information to inform the design project

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Liaise with client and other key stakeholders to determine overall objectives and parameters for the design project 1.5 Proactively seek, review and act on information needed to inform constructive communication with client 1.6 Build trust and respect between self and client through effective communication and demonstration of professional integrity
2 Develop and refine design brief	2.1 Develop concepts and ideas for inclusion in design brief, taking account of overall objectives and parameters 2.2 Undertake own analysis of concept and challenge ideas and approaches taken to ensure responsiveness to project needs 2.3 Present ideas in an appropriate format/medium and seek feedback from key stakeholders 2.4 Use effective communication techniques to generate discussion, debate and critical analysis 2.5 Re-evaluate and refine options based on own analysis and discourse with others 2.6 Establish and agree on final nature and scope of design brief with client and accurately document details
3 Negotiate terms and conditions	3.1 Negotiate and agree terms and conditions of brief in accordance with relevant organisational and professional standards 3.2 Clarify, agree and document roles and responsibilities of those involved in the project 3.3 Confirm agreements in writing in accordance with organisational requirements 3.4 Identify the need for specialist advice when developing formal agreements or contracts, and seek appropriate assistance

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	• Identifies and interprets textual information from

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		various sources to develop ideas and concepts
Writing	1.1, 1.3-1.5, 2.1-2.3, 2.6, 3.1-3.3	• Develops a range of documents using appropriate vocabulary, context and formatting for different audiences
Oral Communication	1.1, 1.4-1.6, 2.3, 2.4, 2.6, 3.1, 3.2	• Participates in discussions to elicit views of others by asking questions and listening to responses • Presents ideas and seeks feedback from others using appropriate tone, vocabulary and language structures
Numeracy	1.2-1.4	• Interprets and applies numeric information relevant to design brief
Navigate the world of work	1.2, 1.3, 3.1, 3.3, 3.4	• Identifies and adheres to organisational policies and procedures, industry standards and legislative requirements during planning and design of design solution
Interact with others	1.1, 1.4-1.6, 2.3, 2.4, 2.6, 3.1, 3.4	• Uses appropriate communication conventions and protocols to seek information from stakeholders • Uses a range of collaborative techniques to clarify and refine ideas and negotiate agreeable outcomes with others
Get the work done	1.1-1.3, 1.5, 2.1, 2.2, 2.5, 3.2	• Sequences and schedules complex activities, monitors implementation, and manages relevant communication • Applies formal problem-solving processes when responding to unpredictable issues and challenges that arise during the testing process • Makes a range of critical and non-critical decisions in relatively complex situations, taking client and organisational requirements and possible constraints into account • Generates new or innovative ideas or concepts through exploration, analysis and critical 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.

Information and references relevant to the design brief must include consideration of:	• legislative and regulatory context • financial/budgetary information • organisational materials • technical reports/data.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDES502 Establish, negotiate and refine a design brief	BSBDES502A Establish, negotiate and refine a design brief	Updated to meet Standards for Training Packages Minor edit to clarify meaning of PC 3.4	Equivalent unit

Links

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

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Assessment Requirements for BSBDES502 Establish, negotiate and refine a design brief

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 finalise at least TWO design briefs for a specific industry purpose
- demonstrate highly-developed interpersonal skills, self-evaluation techniques and the ability to seek expert advice when 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:

- discuss the legal issues that affect negotiations and contracts in the relevant work context
- explain the design process within the specific industry context/design discipline
- compare and contrast the scope, nature and potential variations that occur within design briefs relevant to a specific context
- identify sources of information to assist the development of design concepts within a specific industry context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- appropriate equipment and media to communicate and present ideas and concepts
- sources of information relevant to industry context
- interaction with others to reflect the collaborative nature of the work, and communication and negotiation skills required.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBDES601 Manage design realisation

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 the process of taking a design from concept to final realisation or production. It has a strong focus on planning, implementation and monitoring skills, combined with a sound knowledge of design and production issues and challenges in a given context.

It applies to individuals working in any industry context or design discipline who take responsibility for turning design concept into reality – a product or service of value to the end-user. This person could be an individual designer-maker or a designer working as part of a larger design/production team.

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

Unit Sector

Design – Design Process

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 Plan realisation of design	1.1 Collect, analyse and maintain relevant information on the design 1.2 Discuss and agree on standards of work and monitoring requirements with appropriate stakeholders 1.3 Develop clear plan and schedule for design realisation,

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ELEMENT	PERFORMANCE CRITERIA
	including key roles and responsibilities linked to timelines and budget
2 Implement and monitor realisation of design	2.1 Organise and/or allocate resources to achieve realisation of design within required standards, timeframes and budget 2.2 Liaise with others involved in design realisation to ensure obligations and quality standards are met within time, budget and technical resources 2.3 Maintain accurate, relevant and complete documentation in accordance with agreed standards 2.4 Monitor process to ensure integrity of design is maintained at all times, including through the process of challenging and interrogating own design work 2.5 Promptly identify difficulties or problems that arise in relation to realisation of design and take action to rectify situation
3 Liaise and negotiate with stakeholders	3.1 Establish and maintain appropriate communication channels with relevant stakeholders 3.2 Proactively seek and provide information to facilitate effective design realisation 3.3 Adhere to agreed terms and conditions or negotiate appropriate changes in light of changed circumstances 3.4 Negotiate and agree on revisions with relevant parties in a professional manner, to enhance quality of outcome
4 Complete design process	4.1 Finalise design outcomes in accordance with terms and conditions 4.2 Seek feedback from key stakeholders on finished design and make final adjustments as agreed 4.3 Evaluate completed design in relation to own work and overall process, to inform future 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

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Reading	1.1, 2.3	• Collates and analyses textual information from a range of sources relevant to the design realisation
Writing	2.3, 3.1, 3.2, 4.3	• Produces documentation using appropriate structure, language and context to articulate own ideas and positions
Oral Communication	1.2, 3.2-3.4, 4.2	• Articulates clearly using specific language and appropriate tone to convey information • Uses active questioning and listening techniques to confirm understanding
Numeracy	1.3, 2.1	• Interprets and uses numeric information in budgets and to determine work schedules
Navigate the world of work	2.3, 3.3, 4.1	• Works independently and collectively within broad parameters, with a strong sense of responsibility and ownership of plans, decisions and outcomes • Adheres to organisational policies and procedures
Interact with others	1.2, 2.2, 3.1, 3.2, 3.4	• Recognises the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how • Fosters a collaborative culture within own sphere of influence, facilitating a sense of cohesion and commitment
Get the work done	1.1, 1.3, 2.1, 2.4, 2.5	• Takes responsibility for planning and organising tasks to meet workplace deadlines, including those tasks that require liaison with other people • Applies formal problem-solving processes when responding to unpredictable issues and challenges that arise during the design process • Uses each experience to reflect on how variables impact outcomes to inform future practices

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES601 Manage design realisation	BSBDES601A Manage design realisation	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBDES601 Manage design realisation

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:

- produce a design according to all brief requirements
- demonstrate highly-developed interpersonal and negotiation skills to deliver the finished product.

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 responsibilities of relevant personnel in this context
- describe best practices when dealing with setbacks in the production process
- explain production processes in a particular industry context or discipline including required materials, tools and equipment.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to:

- resources, tools, materials and equipment required for realising a design in a specific context
- a design concept that the candidate can take to realisation stage
- other people to reflect the collaborative nature of the work.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBDES602 Research global design trends

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 research and critically evaluate global design trends. The focus is on research and analysis of information and ideas at a complex level, plus the evaluation and extension of the individual's professional skills.

It applies to individuals who need to maintain a current and comprehensive knowledge of global design trends to inform their own professional practice. Although predominantly for designers, this unit may also be relevant to those who work in related management, marketing and production areas.

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

Unit Sector

Design – Design Process

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 Research design trends	1.1 Analyse and select formal and informal research strategies to source information on global design trends 1.2 Identify and explore new and alternative sources 1.3 Evaluate the credibility of information gathered and ensure research scope is sufficiently broad

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ELEMENT	PERFORMANCE CRITERIA
2 Analyse design trends to inform own practice	2.1 Use information to challenge and extend own perspectives and ways of thinking 2.2 Examine and assess implications and consequences of design trends on own work 2.3 Use critical analysis to identify creative or commercial opportunities presented by emerging trends and technologies 2.4 Develop systems to identify and respond to future opportunities
3 Develop and articulate positions and ideas	3.1 Develop substantiated positions and ideas on global design trends 3.2 Generate informed discussion, debate and critical analysis with peers and colleagues 3.3 Use debate and feedback to challenge and refine own positions
4 Extend own design skills	4.1 Proactively identify and use opportunities presented by research to extend own design skills 4.2 Re-evaluate and refine approaches to work in the context of current and emerging trends 4.3 Use practice, discussion and ongoing evaluation to continuously improve skills

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	4.1-4.3	• Plans and implements strategies to improve and extend own knowledge and skills
Reading	1.1-1.3, 2.1, 2.2	• Analyses and synthesises complex and varied information from a range of sources
Writing	2.4	• Documents methods for identifying future opportunities using vocabulary and structure appropriate to context and purpose
Oral Communication	3.2, 3.3, 4.3	• Elicits the views others by participating in critical discourse and debate on conceptual and technical

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		design trends • Uses active listening techniques to gain input and feedback
Navigate the world of work	2.3	• Keeps abreast of trends and issues, appreciating the world of work is dynamic, with changing needs and priorities, and that career development is not a linear process that can be closely controlled
Get the work done	1.1-1.3, 2.1-2.4, 3.1, 3.3, 4.2	• Takes responsibility for planning and organising tasks required to conduct required research, including how to link with the work of others • Keeps abreast of innovations and good practice beyond own context, borrowing, adapting, combining and redesigning for own purposes • Uses reflection and feedback from others to evaluate outcomes to inform future practices • Actively identifies digital systems, devices and applications with potential to meet current and/or future needs

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES602 Research global design trends	BSBDES602A Research global design trends	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

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Assessment Requirements for BSBDES602 Research global design trends

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:

- conduct research on a complex range of design issues, trends and ideas
- document the analysis, critique and synthesis of complex sources to develop own positions and ideas
- use opportunities to refine own design skills.

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 broad global design trends that apply to all design disciplines
- discuss the business implications/consequences of adopting trends and emergent technologies
- compare and contrast different research methodologies and options
- outline sources of information on global design, design trends and broader references that may inform emerging and innovative design practice
- critique specific current and emerging design technologies and trends (at a global level) in at least one area of design.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to a current and varied range of familiar and unfamiliar information sources.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBDES801 Research and apply design theory

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 research, in significant depth and breadth, and apply different theories of design.

It applies to individuals who use sophisticated research and critical analysis skills in the exploration of design, design theory and its application to professional design practice.

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

Unit Sector

Design – Design Process

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 Research design theory	1.1 Use a range of research techniques to source information about design theory 1.2 Identify and explore new, emerging and alternative sources of ideas and thinking on design 1.3 Expand own knowledge and understanding of design through review and critical analysis of information 1.4 Analyse, compare and contrast a range of theoretical perspectives and thinking on design

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ELEMENT	PERFORMANCE CRITERIA
2 Apply theories of design to professional practice	2.1 Evaluate the relevance and application of different theories of design based on analysis of own professional and personal experience 2.2 Analyse the ways different aspects of history, theory and other influences are applied, adapted or challenged in practice 2.3 Assess how theories and thinking about design may be applied to benefit individuals, businesses and communities
3 Develop, articulate and debate own perspectives on theories of design	3.1 Take a critical approach to different theories and reflect on own ideas and responses 3.2 Develop own substantiated positions in response to research and analysis 3.3 Articulate own positions, demonstrating clarity of thought and conceptual understanding of different theories and thinking 3.4 Debate positions on design showing belief in own ideas and a willingness to remain open to new perspectives

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	1.3, 2.1	• Draws on a range of strategies to facilitate personal and professional learning
Reading	1.1, 1.2, 1.4, 2.2	• Identifies and interprets complex concepts and theories from a range of sources
Writing	3.3	• Organises information and uses structure, language and context to clearly explain own ideas and positions
Oral Communication	3.3, 3.4	• Actively engages in critical discourse using appropriate vocabulary, tone and pace • Uses active listening techniques to gain input and feedback
Get the work done	1.2, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2	• Takes responsibility for planning and organising own tasks and workload, including how to link with the work of others • Systematically analyses information to aid in deciding

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		on own views and ideas • Keeps abreast of innovations and good practice beyond own context, using ideas to rethink current approaches

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDES801 Research and apply design theory	BSBDES701A Research and apply design theory	Updated to meet Standards for Training Packages Code changed to meet updated AQF requirements 2013	Equivalent unit

Links

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

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Assessment Requirements for BSBDES801 Research and apply design theory

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:

- conduct research into past, current and emerging theories of design
- develop substantiated positions on design and its application in own professional 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:

- compare and contrast different theories of design, including different historical perspectives and current and emerging thinking
- explain relationship between theories of design and design in practice with reference to a particular work or broader social context
- summarise the relationships, similarities and differences at a conceptual and practical level between the concepts of design, innovation and creativity
- rationalise the systemic impacts on design – social, economic, political and environmental.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the design process field of work and include access to and use of current and emerging sources of information and thinking on design.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBDIV301 Work effectively with diversity

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 recognise and interact productively with diversity in the workplace. It covers sensitive responses to, and interactions with, all manner of diversity that might be encountered during the course of work.

It applies to individuals who work in a variety of contexts where they will be expected to interact with a diverse client and/or co-worker population. 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

Workforce Development – Diversity

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 Recognise individual differences and respond appropriately	1.1 Recognise and respect individual differences in colleagues, clients and customers 1.2 Respond to differences sensitively 1.3 Ensure behaviour is consistent with legislative requirements and enterprise guidelines 1.4 Accommodate diversity using appropriate verbal and non-verbal

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ELEMENT	PERFORMANCE CRITERIA
	communication
2 Work effectively with individual differences	2.1 Recognise and document knowledge, skills and experience of others in relation to team objectives 2.2 Encourage colleagues to utilise and share their specific qualities, skills or backgrounds with other team members and clients in order to enhance work outcomes 2.3 Ensure relations with customers and clients demonstrate that diversity is valued by the business

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, 2.1	• Comprehends textual information to determine regulatory requirements and adhere to internal policies
Writing	1.4, 2.1	• 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	1.2, 1.3, 1.4, 2.2, 2.3	• Uses appropriate tone, speech and pace in verbal interactions • Selects vocabulary appropriate to the audience
Navigate the world of work	1.3	• Complies with legislative requirements and explicit policies and procedures
Interact with others	1.1, 1.2, 1.4, 2.1-2.3	• Identifies and takes steps to follow accepted communication practices and protocols • Contributes to work group activities using accepted conventions • Recognises common cultural and other differences of people in the work context and makes adjustments to respect and accommodate these differences
Get the work done	2.1	• Plans and implements routine tasks according to directions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDIV301 Work effectively with diversity	BSBDIV301A Work effectively with diversity	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

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Assessment Requirements for BSBDIV301 Work effectively with diversity

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:

- adjust language and behaviour as required by interactions with diversity
- identify and respect individual differences in colleagues, clients and customers
- apply relevant regulations, standards and 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:

- identify major groups in the workplace and community, as defined by cultural, religious and other traditions and practices
- identify reasonable adjustments that facilitate participation by people with a disability
- explain the value of diversity to the economy and society in terms of:
  - workforce development
  - Australia's place in the global economy
  - innovation
  - social justice.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- office equipment and resources
- examples of regulations, standards and codes of practice working with diversity

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- examples of workplace diversity issues
- case studies and, where possible, real situations
- examples of workplace diversity policies and procedures
- 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

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BSBDIV501 Manage diversity in the workplace

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 diversity in the workplace. It covers implementing the organisation's diversity policy, fostering diversity within the work team and promoting the benefits of a diverse workplace.

It 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

Management and leadership – diversity

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 Implement diversity policy	1.1 Locate and review diversity policy 1.2 Determine its application to the specific work context 1.3 Institute actions to ensure that the diversity policy is understood and implemented by relevant parties 1.4 Provide feedback and suggestions for improvement to ensure currency and efficacy of diversity policy

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ELEMENT	PERFORMANCE CRITERIA
2 Foster respect for diversity in the work team	2.1 Address own prejudices and demonstrate respect for difference in personal interactions 2.2 Aim for diversity in selecting and recruiting staff 2.3 Identify and address training needs to address issues of difference in the team 2.4 Manage tensions and encourage collaboration and respect between staff who struggle to work effectively with difference 2.5 Assist staff to see that working effectively with difference is a strength that can improve the organisation's products, services and customer relations 2.6 Manage allegations of harassment and address complaints according to established organisational procedures
3 Promote the benefits of diversity	3.1 Promote the organisation's workforce diversity in internal and external forums to enhance the company's image and reputation 3.2 Capture ideas and information from the diversity in the workforce to enhance products and services and contribute to competitive advantage 3.3 Support organisational efforts to value diversity

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, 2.3, 2.5, 2.6, 3.1, 3.2	• Identifies, analyses and evaluates complex texts to determine particular diversity requirements
Writing	1.2, 1.3, 1.4, 2.3, 2.5, 2.6, 3.1, 3.2	• 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	1.3, 1.4, 2.3, 2.5, 3.1, 3.2	• 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

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		or confirm understanding
Navigate the world of work	1.1, 1.3, 1.4, 2.6	• Takes full responsibility for following policies, procedures and legislative requirements • Seeks to improve policies and procedures to better meet organisational goals
Interact with others	1.3, 1.4, 2.1, 2.3-2.6, 3.2, 3.3	• 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 • Manages conflict in the workplace through the recognition of contributing factors and by implementing strategies to resolve conflict
Get the work done	1.2, 1.4, 2.2-2.6, 3.1-3.3	• 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 • Investigates new and innovative ideas as a means to continuously improve work practices and processes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDIV501 Manage diversity in the workplace	BSBDIV501A Manage diversity in the workplace	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

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Assessment Requirements for BSBDIV501 Manage diversity in the workplace

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:

- demonstrate the application of diversity policy in a work context
- critically review a diversity policy
- implement strategies to ensure that diversity is understood and respected in the work team
- demonstrate compliance with procedures for handling complaints or harassment allegations
- promote the benefits of diversity to 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:

- outline formal and informal complaints procedures
- identify and outline key features of relevant current legislation regarding:
  - age discrimination
  - disability discrimination
  - racial discrimination
  - sex discrimination
  - human rights
  - equal opportunity.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- legislation, regulations and codes of practice for managing diversity
- workplace diversity policies and procedures
- 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

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BSBDIV601 Develop and implement diversity policy

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 research diversity and its importance to organisational activity and to draft, plan and implement diversity policy.

It applies to individuals working in organisations with staff and clients from different cultures, races or religions, multiple generations, or where there are other forms of diversity in the workforce.

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

Unit Sector

Workforce Development – Diversity

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 Research diversity	1.1 Analyse existing practices and information in relation to diversity 1.2 Identify potential benefits of diversity and analyse in relation to business objectives 1.3 Consult key stakeholders about their requirements for a diversity policy 1.4 Access diversity policies from similar organisations and review

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ELEMENT	PERFORMANCE CRITERIA
	for relevance to own organisation
2 Draft policy and plan for implementation	2.1 Draft diversity policy 2.2 Develop action plans for policy 2.3 Consult key stakeholders for feedback on draft policy and action plans 2.4 Determine relationships and links with other related policies 2.5 Revise policy for implementation
3 Implement diversity policy	3.1 Explain and interpret policy to key stakeholders 3.2 Promote policy across the organisation through a range of communication channels 3.3 Identify intended and unintended impacts of policy implementation 3.4 Develop tools, benchmarks and other indicators for planning and measuring impact of policy implementation 3.5 Monitor business activities, team plans and staff performance to ensure diversity policy is effectively implemented
4 Review diversity policy	4.1 Gather and analyse information about diversity, the policy and its implementation 4.2 Consult key stakeholders to provide feedback on the policy 4.3 Develop and approve recommendations for changes to the policy 4.4 Refine diversity policy in accordance with feedback and recommendations

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, 2.1, 2.2, 2.4, 2.5, 3.1, 3.3, 3.4, 3.5, 4.1, 4.3	• Identifies, analyses and evaluates complex information to determine business requirements • Monitors reported information to determine efficiency of policy

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Writing	1.3, 2.1, 2.2, 2.3, 2.5, 3.2, 3.4, 4.2, 4.3, 4.4	• Develops detailed procedural material according to organisational and legislative requirements • Records and collates feedback from stakeholders • Prepares factual and informative documentation to suit purpose and audience
Oral Communication	1.3, 2.3, 3.1, 3.2, 4.2	• 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
Navigate the world of work	1.2, 2.1, 2.5, 3.4, 4.3, 4.4	• Works autonomously making high level decisions to achieve and improve organisational goals • Develops and implements strategies that ensure organisational policies, procedures and regulatory requirements are being met • Monitors and reviews the organisation's policies, procedures and adherence to legislative requirements in order to implement and manage change
Interact with others	1.3, 2.3, 3.1, 3.2, 4.2	• Adapts personal communication style to build a positive working relationship and show respect for the opinions, values and particular needs of others • Plays a lead role in situations requiring effective collaborative skills, demonstrating high level negotiation skills and ability to influence others • Shares knowledge, information and experience openly as an integral part of the working relationship
Get the work done	1.1, 1.2, 1.4, 2.1, 2.2, 2.4, 2.5, 3.2-3.5, 4.1, 4.3	• Develops plans for complex, high impact activities with strategic implications for the organisation • Gathers and analyses data and seeks feedback to improve plans and processes • Makes high impact decisions in a complex and diverse environment, using input from a range of sources • Identifies key factors that impact on decisions and their outcomes, drawing on experience, competing priorities, and decision making strategies where appropriate

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBDIV601 Develop and implement diversity policy	BSBDIV601A Develop and implement diversity policy	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBDIV601 Develop and implement diversity policy

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:

- analyse information about diversity from a range of internal and external sources to identify:
  - existing practices
  - potential benefits of diversity and the fit with business objectives
- develop a comprehensive diversity policy with details of an implementation strategy and how the policy will be monitored and reviewed
- implement, evaluate and change the diversity policy based on recommendations for improvement
- consult with relevant stakeholders during development, implementation and review of the diversity policy and procedures.

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 business operations that can be linked to diversity
- identify potential benefits of diversity to the organisation
- describe diversity within the business environment including:
  - cultures
  - beliefs
  - traditions and practices
- describe contemporary theory about diversity and its potential contribution to business advantage

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- outline legislation, codes of practice and national standards as they apply to development of diversity policy.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- business technology
- legislation, regulations and codes of practice for managing diversity
- workplace diversity policies and procedures
- 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

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BSBDIV801 Conduct strategic diversity workforce 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 conduct high level strategic diversity workforce planning for an organisation. This includes developing objectives and strategies, implementing initiatives and 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 of the Australian population in an attempt to actively leverage diversity in the workplace.

This unit also covers the research associated with labour markets, labour market programs and the requirement to match organisational needs with employee skills and knowledge.

It applies to individuals who assess factors that may affect the supply of workers; align workforce objectives with business plans; and design strategies and succession plans to ensure a competent and appropriately diverse workforce is available to meet anticipated changes.

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

Unit Sector

Workforce Development - Diversity

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
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 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 workforce objectives and strategies	2.1 Establish objectives to enhance diversity within the organisation, including considerations such as the modification or retention of the workforce to enhance inclusivity and training and development opportunities for all cohorts 2.2 Establish management strategies that support valuing and leveraging diversity 2.3 Communicate objectives and rationale to relevant stakeholders 2.4 Obtain agreement and endorsement for diversity objectives and establish targets 2.5 Improve overall organisational diversity practices by developing contingency strategies in areas of identified need, that incorporate unrepresented and underrepresented population cohorts
3 Implement initiatives to support diversity workforce planning objectives	3.1 Implement action to support agreed objectives that aim to increase opportunities for unrepresented or underrepresented population cohorts 3.2 Incorporate the need for skilled labour to meet organisational needs and the possible use of government labour market programs for training and development purposes into implementation initiatives 3.3 Implement strategies that leverage diversity to assist in meeting the organisation's workforce diversity objectives 3.4 Implement a succession planning system to ensure workers from diverse backgrounds are developed and retained 3.5 Implement appropriate programs, to ensure compliance with regulatory and ethical requirements 3.6 Implement programs that support valuing and leveraging diversity in the workplace

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ELEMENT	PERFORMANCE CRITERIA
4 Monitor and evaluate workforce trends	4.1 Review workforce planning objectives against exiting employees, workforce changes and the local population 4.2 Monitor labour supply trends for areas of over or under supply in the external environment with a view to correcting cohort representational issues within the organisation's workforce 4.3 Monitor effects of labour trends on demand for labour 4.4 Refine objectives and strategies in response to internal and external changes and make recommendations in response to global diversity issues 4.5 Regularly review government policy on labour demand and supply, focussing on opportunities for unrepresented or underrepresented population cohorts 4.6 Evaluate effectiveness of change processes against agreed objectives in order to promote the leveraging of diversity in 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, 1.2, 1.3, 1.4, 1.5, 2.1, 3.3, 3.4, 4.1, 4.2, 4.4, 4.5, 4.6	• Sources, evaluates and critiques ideas and information from a range of complex texts to assist with decisions, change management, and to manage organisational requirements • Monitors reported information to evaluate progress of workforce diversity progress
Writing	1.5, 3.3, 3.4, 4.4	• 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	2.3	• Presents information using language and non-verbal features appropriate to audience
Navigate the world of work	1.5, 2.2, 2.3, 2.4, 3.3, 3.4, 3.5, 3.6,	• Works autonomously making high level decisions to achieve and improve organisational goals

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	4.1, 4.6	• Develops and implements strategies that inform organisational policies, procedures and meet regulatory requirements
Interact with others	2.3	• Selects and uses appropriate conventions and protocols when communicating with stakeholders in a range of work contexts
Get the work done	1.3, 1.4, 1.5, 2.2, 2.4, 2.5, 3,1-3.6, 4.1-4.6	• Develops plans to manage complex activities with strategic implications • Identifies key factors that impact on decisions and their outcomes, drawing on experience, competing priorities and decision-making strategies where appropriate • Coordinates and analyses all relevant information to inform decisions with the potential to affect organisational outcomes • Systematically monitors diversity initiatives to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDIV801 Conduct strategic diversity workforce planning	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

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Assessment Requirements for BSBDIV801 Conduct strategic diversity workforce 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:

- research opportunities for workforce diversity
- develop organisational workforce diversity objectives and strategies
- implement at least three initiatives to support workforce diversity
- critically analyse existing organisational workforce diversity objectives with evaluation of their effectiveness and recommendations for improvement.

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 organisational workforce diversity 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
- outline strategies that support leveraging organisational diversity
- describe diversity planning methodologies
- describe how workforce trends affect workforce planning methodologies
- describe organisational diversity including:
  - cultures
  - beliefs
  - traditions and practices
  - equal opportunity
  - diversity as a business advantage.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- legislation, regulations and codes of practice
- organisational records, policies and procedures
- 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

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BSBDIV802 Conduct strategic planning for diversity learning practices

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, implement and review organisational diversity strategies and the quality of training and assessment products and services for its implementation. This unit focuses on valuing and actively leveraging diversity in the workplace.

It applies to individuals who plan, design, implement, monitor and review diversity learning strategies at an organisational level.

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

Unit Sector

Workforce Development - Diversity

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 Plan diversity learning strategy	1.1 Evaluate approaches to learning and workplace training against organisational strategic requirements that support valuing and leveraging diversity 1.2 Consult relevant stakeholders for ideas on strategic diversity

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ELEMENT	PERFORMANCE CRITERIA
	learning requirements 1.3 Analyse and plan diversity learning strategy to support organisational and regulatory requirements 1.4 Analyse and plan technological and systems requirements for organisational diversity learning strategy 1.5 Analyse and align organisational diversity learning strategy with human resources and learning requirements 1.6 Provide learning recommendations that support how various diversity dimensions may affect individuals and their experiences; and inclusive social interactions
2 Design and develop organisational diversity learning strategy	2.1 Design organisational diversity learning and assessment strategy that focuses on valuing and leveraging diversity and meets instructor, learner and organisational strategic requirements 2.2 Develop diversity learning strategies to permit and promote responsiveness of the organisation to changed circumstances and priorities
3 Implement organisational diversity learning strategy	3.1 Implement diversity learning strategy that supports valuing and leveraging diversity and is appropriate to organisational and regulatory requirements 3.2 Validate organisational assessment methods and assessment tools consistent with learning and wider operational needs 3.3 Source diversity learning resources compliant with international, national, industry, workplace and regulatory requirements
4 Review organisational diversity learning and development	4.1 Develop procedures to liaise with diversity organisations, cohort organisations, educators, learners and other relevant stakeholders to monitor how well learning strategies and learning resources achieve diversity organisational learning targets 4.2 Monitor and incorporate national policy issues and system changes into organisational learning and development strategies and practices 4.3 Review policies and procedures for continuing relevance, operational effectiveness, forward thinking and to identify any gaps 4.4 Consult relevant stakeholders to ascertain the effect of strategic outcomes attained through diversity organisational

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ELEMENT	PERFORMANCE CRITERIA
	learning strategy, and update policies and procedures accordingly
5 Improve diversity organisational learning strategy formation	5.1 Evaluate the entire implementation process of the diversity organisational learning strategy 5.2 Review performance of resources and people supporting the diversity organisational learning strategy implementation 5.3 Construct and present plans for improving the diversity organisational learning strategy

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, 1.5 3.3, 4.2, 4.3, 5.1, 5.2	• Sources, evaluates and critiques ideas and information from a range of complex texts to assist with decisions on learning processes for diversity organisational learning strategy • Monitors reported information to evaluate progress of diversity learning strategy
Writing	1.6, 2.1, 2.2, 4.1,4.2, 4.3, 5.3	• 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	1.2, 4.4	• Presents information using language and non-verbal features appropriate to audience • Uses listening and questioning skills to gather opinions and confirm understanding
Navigate the world of work	1.5, 2.1, 2.2, 3.1, 3.3, 4.1, 4.2, 4.3, 4.4, 5.1, 5.2, 5.3	• Works autonomously making high level decisions to achieve and improve organisational goals • Develops and implements diversity learning strategy in accordance with organisational and regulatory requirements
Interact with others	1.2, 4.4	• Selects and uses appropriate conventions and protocols when communicating with stakeholders in a range of work contexts

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Get the work done	1.1, 1.3, 1.4, 1.5, 1.6, 2.1, 2.2, 3,1, 3.2, 4.1, 5.1, 5.2, 5.3	• Develops plans to manage complex learning activities that involve actively embracing difference and promoting diverse skills, knowledge and experience • Investigates digital technologies required to support strategies • Coordinates and analysis all relevant information and evaluates options in order to inform decisions with the potential to affect organisational outcomes • Systematically monitors performance to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDIV802 Conduct strategic planning for diversity learning practices	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

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Assessment Requirements for BSBDIV802 Conduct strategic planning for diversity learning practices

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 diversity learning strategy
- design, develop and implement a comprehensive organisational diversity learning strategy
- critically analyse existing organisational diversity learning strategy with evaluation of its effectiveness and recommendations for improvement, aiming for learning strategies that support valuing and leveraging diversity.

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 organisational diversity learning strategy, including:
  - regulatory requirements
  - rationale for a diversity learning strategy within an organisation
- outline learning strategies that support organisational diversity learning requirements
- list and discuss organisational learning and assessment strategies that incorporate valuing and leveraging diversity principles.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- organisational records, policies and procedures
- legislation, regulations and codes of practice

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- 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

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BSBDIV803 Develop cross cultural communication and negotiation strategies

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 effective cross cultural communication and negotiation skills, and to develop these skills in international education business contexts.

It applies to individuals who manage education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education).

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

Unit Sector

Workforce Development – Diversity

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 Analyse own organisation's international education practices using theoretical models of culture	1.1 Define the key elements of culture and cultural diversity from a range of perspectives 1.2 Investigate and analyse interaction between the key elements of culture and cultural diversity 1.3 Apply theoretical models of culture and cultural diversity to an international education provider context and own organisational

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ELEMENT	PERFORMANCE CRITERIA
	practices
2 Evaluate cultural features of selected countries relevant to the business of education	2.1 Describe significant events that have shaped the identity of selected countries 2.2 Research and profile key characteristics of education and training systems in selected countries 2.3 Analyse and describe broad cultural differences in learning behaviour in selected countries 2.4 Research and evaluate teaching styles, educational practices, and delivery and assessment methods, in selected countries 2.5 Compare and contrast distinguishing features of business practices in selected countries
3 Develop cross cultural awareness strategies, and communication and negotiation skills in an international education setting	3.1 Identify and communicate ways in which cultural norms in the workplace operate to regulate, repress, tolerate and celebrate diversity 3.2 Evaluate potential impact of improved cross-cultural awareness on personal, educational and commercial interactions 3.3 Apply formal and informal coaching and training strategies to improve organisational cross-cultural communication practices and strategies 3.4 Determine appropriate criteria and strategies to evaluate effectiveness of communication and negotiation in an international education setting

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, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3, 3.4	• Investigates, analyses and evaluates information from various sources to develop awareness of different cultural models, behaviours and systems
Writing	1.1-1.3, 2.1-2.5, 3.1-3.4	• Documents research findings using clear and comprehensible language and layout • Prepares factual and informative documentation to suit purpose and audience

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Oral Communication	3.1, 3.3	• Presents information using language and non-verbal features appropriate to audience
Navigate the world of work	1.3, 3.3, 3.4	• Works autonomously making high level decisions to achieve and improve organisational goals • Develops and implements strategies to achieve organisational and regulatory requirements
Interact with others	3.1, 3.3	• Develops and implements communications strategies with internal and external persons to build effective working relationships
Get the work done	1.1, 1.2, 2.1-2.5, 3.2-3.4	• Develops plans to manage complex activities with strategic implications • Systematically gathers and analyses all relevant information and evaluates options to inform decisions with the potential to affect organisational outcomes • Use digital systems and tools to complete research

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBDIV803 Develop cross cultural communication and negotiation strategies	BSBDIV701A Develop cross cultural communication and negotiation strategies	Updated to meet Standards for Training Packages Recoded to meet AQF standards	Equivalent unit

Links

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

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Assessment Requirements for BSBDIV803 Develop cross cultural communication and negotiation strategies

Modification History

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

Performance Evidence

Evidence of the ability to:

- apply cross-cultural knowledge and protocols
- effectively communicate with diverse groups and individuals in the work-related environment
- research communication styles and methods, and cultural protocols for use with people from a range of countries
- document cross cultural awareness and communications 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:

- outline communication styles and methods, and cultural protocols for use with people from a range of countries
- define culture and cultural diversity based on a number of theoretical models
- identify cultural bias inherent in any conceptual model of culture
- outline implicit and explicit similarities and differences within and between countries and cultures
- list important cultural features of selected countries
- describe various personal cultural assumptions shaping expectations and outcomes
- identify sources of assistance for international students and visitors, including location of and access to interpreters
- outline special types of communications for the international education environment.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – diversity field of work and include access to:

- organisational policies and procedures related to international education practices
- business technology
- 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

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BSBEBU401 Review and maintain a website

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 data analysis, review website content, and update and maintain a website.

It applies to individuals who have knowledge of the relationship between a website and the core functions of an organisation. They also have working knowledge and skills to perform basic updates to website content. 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

Information and Communications Technology – E-Business

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 Review website content and use	1.1 Monitor and analyse customer and user feedback in accordance with organisational timelines 1.2 Analyse automatically collected website data and identify trends 1.3 Make recommendations on changes to website and its content in response to feedback and data analysis, and approve changes scheduled for implementation

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Review cost implications of the recommended changes to determine their viability
2 Update website	2.1 Replace superseded and inaccurate information with current information and add additional material in accordance with organisational requirements 2.2 Follow protocols for ensuring the accuracy and authenticity of information 2.3 Remove services no longer available or required and add new ones in accordance with organisational requirements 2.4 Check offline information against that posted on the website and rectify any discrepancies in accordance with organisational timelines 2.5 Follow security procedures for updating the website
3 Carry out non-technical site maintenance	3.1 Analyse user feedback to confirm website faults are not user issues 3.2 Rectify faults and make improvements to website in response to user feedback approved by the organisation 3.3 Add new web pages and/or active links and remove redundant pages and links in accordance with organisational requirements 3.4 Make website changes in response to changes in marketing strategy, in accordance with organisational requirements and consideration of cost benefits

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, 2.1, 2.3-2.5, 3.1-3.4	• Recognises text within job specifications and work processes related to the outcomes of the job
Writing	1.3, 1.4, 2.1-2.5, 3.2-3.4	• Records key information related to the outcomes of the job

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Oral Communication	1.3, 3.2	• Makes recommendations on changes to website content • Analyses and responds to user feedback
Numeracy	1.4	• Uses basic numeracy skills to determine cost implications and viability
Navigate the world of work	1.1-1.4, 2.1-2.5, 3.1-3.4	• 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
Interact with others	1.3, 3.2	• Selects and uses appropriate conventions and protocols when communicating with clients and users in a range of work contexts
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.4	• Takes responsibility for planning, sequencing tasks for efficient and effective organisational outcomes • Uses problem solving processes to identify and analyse technical issues • Contributes to continuous improvement of website by applying basic principles of analytical thinking • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEBU401 Review and maintain a website	BSBEBU401A Review and maintain a website	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

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Assessment Requirements for BSBEBU401 Review and maintain a website

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:

- analyse data to make recommendations about changes to website
- update web pages according to organisational requirements
- analyse data, identify and resolve faults, errors and/or complaints on website.

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 review knowledge of key provisions of relevant legislation, regulations, and standards and codes of practice that may affect aspects of business operations
- explain basic principles of website design and maintenance
- outline online security issues.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – e-business field of work. This includes access to:

networked computers

- computers and office equipment
- industry software packages
- documentation relating to analysis and strategies/policies for implementation.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBEBU501 Investigate and design e-business solutions

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 evaluate e-business models and strategies, as well as incorporate the results of these evaluations into the design of an e-business solution.

It applies to individuals who possess skills and knowledge in a specialist business area, as well as knowledge of software and other technologies. They apply these skills and knowledge in the evaluation, selection and implementation of new strategies for business, which incorporate e-business 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

Information and Communications Technology – E-Business

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 Investigate e-business opportunities	1.1 Undertake a competitive analysis to determine the likely impact new capabilities will have on industry sectors and competitors 1.2 Complete and assess value chain analysis to identify processes

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ELEMENT	PERFORMANCE CRITERIA
	and relationships that may benefit from the adoption of e-business solutions 1.3 Identify threats and opportunities to e-business implementation and evaluate potential contributions to the business 1.4 Conduct resource analysis to identify cost and revenue implications in developing opportunities 1.5 Identify and evaluate legal and ethical issues relating to e-business opportunities
2 Evaluate e-business models	2.1 Identify and analyse business-to-business, business-to-consumer, intra-organisational e-business applications and e-business models 2.2 Rank compatible e-business models in terms of their strengths and weaknesses, considering resourcing, technical and security requirements of each 2.3 Assess cost implications of implementation of e-business models 2.4 Determine an e-business model most appropriate in relation to business plan
3 Design an e-business	3.1 Formulate purpose, objectives and values for the e-business 3.2 Identify target market, and value chain structure in accordance with chosen e-business model 3.3 Identify and obtain technical needs and expertise required to implement e-business model 3.4 Investigate and develop plan to address culture change issues to manage transition to an e-business
4 Implement an e-business strategy	4.1 Develop policies and guidelines to support customers, supply chain and staff to ensure successful implementation 4.2 Monitor performance of business goals and adjust policies and procedures to respond to changing needs of customers, staff and supply chain 4.3 Review e-business systems and models, seeking feedback from users and personnel responsible for e-business implementation 4.4 Incorporate evaluation results and feedback to improve future e-business strategies

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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	1.1-1.5, 2.1-2.4, 3.2-3.4, 4.1-4.4	• Interprets a range of textual information to evaluate opportunities, possible exemplars and technical considerations
Writing	1.1-1.5, 2.1-2.4, 3.1-3.4, 4.1-4.4	• Takes personal notes and develops workplace documentation that clarifies complex ideas using language and structure to suit context and audience
Oral Communication	3.3, 4.3	• Articulates information clearly using language and tone appropriate to audience and environment • Uses active listening and questioning techniques to receive feedback and confirm understanding
Numeracy	1.4, 2.2, 2.3	• Analyses numerical information to determine resources required for job
Navigate the world of work	1.1-1.5, 2.1-2.4, 3.1-3.4, 4.1-4.4	• Develops and reviews organisational procedures to achieve broader workplace goals • Monitors adherence to organisational procedures and legislative requirements
Interact with others	3.3, 4.3	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts
Get the work done	1.5, 2.1-2.4, 3.1-3.4, 4.1-4.4	• Takes responsibility for developing and implementing organisational processes that comply with legislative requirements and achieve required outcomes • Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions • Considers the effectiveness of a solution in terms of how well it met stated goals, and seeks to make improvements • Investigates new and innovative ideas as a means to continuously improve work practices and processes • Uses digital technologies and systems safely, legally and ethically to access, store and share information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBEBU501 Investigate and design e-business solutions	BSBEBU501A Investigate and design e-business solutions	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

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Assessment Requirements for BSBEBU501 Investigate and design e-business solutions

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:

- analyse and evaluate e-business opportunities involving new business models and not simply electronic versions of existing businesses
- provide supporting evidence for choice of e-business solution
- implement, monitor and evaluate an e-business solution.

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 role of a value chain analysis when assessing potential e-business solutions
- identify relevant legislation, regulations, standards and codes of practice that may affect the implementation of the e-business solution
- list key features of a range of e-business models
- outline the policies and guidelines relating to the implementation of the e-business solution.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – e-business field of work and include access to:

- office equipment and materials
- documentation relating to analysis and implementation
- relevant legislation, regulations and codes of practice.

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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

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BSBEBU502 Implement e-business solutions

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 implement e-business solutions, including establishing the initial requirements and developing systems for implementation, and to support ongoing monitoring and review.

It applies to individuals who possess skills and knowledge in a specialist business area, as well as knowledge of software and other technologies. They apply these skills and knowledge in the implementation of e-business 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

Information and Communications Technology – E-Business

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 Set up e-business solution	1.1 Identify legislative and organisational requirements in consultation with relevant personnel 1.2 Evaluate security issues and rank them for acceptable risk 1.3 Evaluate the costs and technology requirements associated with e-business solution in relation to organisational requirements 1.4 Confirm technology and standards required for implementation

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ELEMENT	PERFORMANCE CRITERIA
	with relevant personnel 1.5 Prepare budget for implementation of solution
2 Implement e-business solution	2.1 Delegate responsibility for solution in accordance with organisational policy, procedures and structures 2.2 Develop procedures for solution in accordance with organisational and other business requirements 2.3 Provide training for implementation of solution in accordance with organisational requirements 2.4 Develop security procedures and protocols in accordance with organisational requirements 2.5 Maintain records relating to solution in accordance with legal, ethical and accounting requirements
3 Monitor and review e-business solution	3.1 Monitor outcomes and processes in accordance with implementation strategy and established performance monitoring and reporting requirements 3.2 Use business data and reports to compare plans, budgets, timelines and forecasts relating to actual performance 3.3 Obtain feedback from users and personnel responsible for implementation, and make recommendations to improve future e-business strategies

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	2.3	• Provides training to extend relevant personnel's understanding
Reading	1.2, 1.3, 1.5, 2.1, 3.1-3.3	• Interprets a range of textual information to establish job requirements and implement solutions
Writing	1.1-1.5, 2.1-2.5, 3.1-3.3	• Takes personal notes and develops workplace documentation that clarifies complex ideas using relevant language and structure appropriate to context and audience

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Oral Communication	1.1, 1.4, 2.1, 2.3, 3.3	• Articulates information clearly using language, syntax and tone appropriate to audience and environment • Uses active listening and questioning techniques to receive feedback and confirm understanding
Numeracy	1.3, 1.5, 3.2	• Interprets numerical information to evaluate costs and prepare budgets and timelines
Navigate the world of work	1.1, 1.3, 1.4, 2.1-2.5, 3.1	• Develops and reviews organisational procedures to achieve broader workplace goals • Monitors adherence to organisational procedures and legislative requirements
Interact with others	1.1, 1.4, 2.1, 2.3, 3.3	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts
Get the work done	1.1-1.5, 2.1, 2.4, 3.1-3.3	• Takes responsibility for developing, implementing and monitoring organisational processes to achieve required outcomes • Plans and implements tasks required to achieve organisational requirements • Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions • Considers the effectiveness of a solution in terms of how well it met stated goals, and seeks to make improvements • Identifies digital systems, devices and applications with potential to meet current and/or future needs, including the need for data security

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEBU502 Implement e-business solutions	BSBEBU502A Implement e-business solutions	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

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Assessment Requirements for BSBEBU502 Implement e-business solutions

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:

- document processes and procedures for implementation of an e-business solution
- develop, implement and review an e-business solution.

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:

- briefly describe the key technology requirements for the e-business solution
- identify key provisions of relevant legislation, regulations, standards and codes of practice that may affect implementation of e-business solutions
- outline organisational policies and procedures relating to the e-business solution.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – e-business field of work and include access to:

- office equipment and materials
- relevant legislation, regulations and codes of practice.
- documentation to support analysis of organisational requirements for the e-business solution.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBEDU301 Assist with monitoring compliance in international education 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 assist in monitoring compliance with relevant legislation, regulations, finance and insurance requirements in international education services administration work roles. It emphasises processes that relate to client services, especially reviewing and reporting on compliance.

It applies to individuals carrying out administration work, under supervision and guidance, in an international education environment. They could work in the administration of education programs and projects in organisations from one or more international education sectors.

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

Unit Sector

Administration – Educational Administration

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 Communicate legislative and regulatory obligations to organisation, clients and stakeholders	1.1 Acquire and apply knowledge of relevant legislation and regulations to assist with ensuring compliance 1.2 Use organisational compliance systems and procedures to identify compliance information required by relevant legislation and regulations

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Prepare and check, in line with organisational procedures, information regarding legislative obligations for dissemination to a range of international clients and stakeholders 1.4 Provide legislation-related information to international students to inform them of their obligations and to confirm their understanding of requirements 1.5 Provide information about legislative and regulatory obligations to clients and stakeholders in a range of formats
2 Contribute to processes for compliance with legislative and regulatory requirements	2.1 Identify organisation's student monitoring and reporting processes 2.2 Identify online processes for monitoring and reporting 2.3 Follow operational procedures for administration roles for insurance and financial requirements 2.4 Contribute to case management on organisational reporting procedures 2.5 Take appropriate and timely remedial action through organisational channels in instances of non-compliance
3 Review processes for compliance with legislative and regulatory requirements	3.1 Assist with reviewing processes and policies for student monitoring and reporting 3.2 Review and recommend updates to policies and procedures for legislative and regulatory compliance, in line with work role 3.3 Make approved adjustments to operating procedures in response to changes in legislative and regulatory compliance policies and procedures
4 Interact with stakeholders and groups external to the organisation	4.1 Identify contact information for government agencies and other relevant bodies in relation to compliance requirements 4.2 Follow communication strategies for interaction with government agencies and other relevant bodies 4.3 Apply protocols for liaison and information sharing

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

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	Criteria	
Reading	1.1-1.5, 2.1- 2.4, 3.1-3.3, 4.1, 4.3	• Gathers and interprets a variety of textual information to determine job requirements
Writing	1.3-1.5, 2.5, 3.1-3.3, 4.2, 4.3	• Develops material for a specific audience using clear and detailed language to convey explicit information and requirements
Oral Communication	1.4, 1.5, 2.4, 2.5, 3.1, 3.2, 4.3	• Uses detailed and clear language to clarify and present information according to requirements and audience • Uses active listening to confirm understanding
Navigate the world of work	1.1-1.5, 2.3, 2.4, 3.1, 3.2, 3.3, 4.3	• Takes personal responsibility for adherence to legal and regulatory responsibilities and draws attention to any issues that may affect others • Adheres to organisational policies and procedures • Considers own role in terms of its contribution to the broader goals of the work environment
Interact with others	1.3, 1.4, 1.5, 2.4, 3.1, 4.2, 4.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	2.1, 2.2, 2.4, 2.5	• Plans routine tasks according to organisational processes, taking some responsibility for decisions regarding timing and sequencing • Recognises and responds to predictable non-compliance problems • Takes responsibility for outcomes of routine decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEDU301 Assist with monitoring compliance in international education services	BSBEDU301A Assist with monitoring compliance in international education services	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBEDU301 Assist with monitoring compliance in international education 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:

- identify and apply legislative and regulatory compliance requirements in relation to international education services at a level required for effective performance of work role
- communicate and work with clients from culturally diverse backgrounds.

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 applicable aspects of the current Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations, or any subsequent amendments or versions
- explain child protection legislation in relation to the welfare of, and training of, students under 18 years of age
- demonstrate knowledge of appropriate communication styles and methods
- explain the international education environment and specific organisational work environment, work practices and legislative and regulatory requirements
- list relevant legislation governing Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registration
- list relevant legislation governing student visa compliance and international education services
- explain reporting requirements
- describe quality review processes
- outline relevant administration procedures for student fees.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the educational administration field of work and include access to:

- opportunities to participate in a range of practical exercises and projects
- relevant documents, and monitoring and reporting mechanisms.

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

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BSBEDU302 Assist in resolution of issues and incidents in an international education 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 contribute to the resolution of issues and incidents in an international education environment. It emphasises applying processes to appropriately deal with day-to-day issues and incidents, as well as serious issues and critical incidents, including providing support to clients and others.

It applies to individuals carrying out administration work, with some supervision and guidance, in an international education environment. They may work in the administration of education programs and projects in organisations from one or more international education sectors.

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

Unit Sector

Administration – Educational Administration

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 Contribute to issue resolution and incident response processes	1.1 Deal effectively with day-to-day issues and day-to-day incidents 1.2 Identify and follow organisational policies and procedures for dealing with critical incidents

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Contribute to the resolution of serious issues 1.4 Contribute to response processes in the event of critical incidents 1.5 Assess own responses and seek assistance if needed and as guided by supervisor, manager or external parties/professionals 1.6 Use appropriate initiative in the event of a critical incident, with due regard for own health and safety and that of others, and organisational requirements 1.7 Contribute to debriefing procedures after an issue/incident
2 Contribute information for distribution to those affected by issues and incidents	2.1 Identify types of information required to resolve issues and incidents 2.2 Collect and collate current, relevant information from appropriate sources 2.3 Maintain accessible files of current, relevant information 2.4 Develop and maintain an accessible comprehensive network contacts list 2.5 Review and update information on a regular basis 2.6 Record and report information, in accordance with legislative and regulatory compliance requirements and organisational procedures
3 Communicate effectively with those affected by issues and incidents	3.1 Assess situation according to organisational policy 3.2 Use communication strategies appropriate for individual situations, in line with organisational requirements 3.3 Communicate effectively with clients of the organisation and other relevant stakeholders when dealing with issues and critical incidents 3.4 Arrange access to counsellors or other support people if and when required
4 Contribute to records and team reports on issues and incidents	4.1 Establish sensitivity of information and level of confidentiality required, in reporting issues and incidents 4.2 Participate in team activities for assessing details of progress and outcomes of issues and incidents 4.3 Interact and consult with team members to record and report issues and incidents 4.4 Contribute to the debriefing process with teams and individuals including referring to network contacts as applicable

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ELEMENT	PERFORMANCE CRITERIA
5 Contribute to development of organisational policies and procedures for the resolution of issues and incidents	5.1 Apply relevant organisational policies and procedures for the resolution of issues and incidents 5.2 Review organisational policies and procedures relevant to specific issues and incidents, with appropriate organisation officers 5.3 Suggest adjustments to organisational policies and procedures based on outcomes reports
6 Provide advice to clients in resolving issues and incidents	6.1 Establish or contribute to protocols and processes for resolving issues and dealing with incidents 6.2 Apply appropriate advisory processes according to individual client needs 6.3 Communicate processes to relevant stakeholders 6.4 Consult with relevant stakeholders to evaluate process outcomes

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, 2.1-2.6, 4.4, 5.2, 5.3, 6.1	• Gathers and interprets a variety of textual information from a range of sources and identifies relevant and key information
Writing	1.3-1.5, 1.7, 2.2-2.6, 3.2, 3.3, 4.2-4.4, 5.3, 6.1, 6.3, 6.4	• Develops material to convey explicit information using clear and detailed language and other terminology appropriate to different audiences • Prepares recommendations which convey an understanding of outcomes and alternatives
Oral Communication	1.3-1.5, 1.7, 2.2, 3.2-3.4, 4.2-4.4, 5.2, 5.3, 6.1, 6.3, 6.4	• Participates in verbal exchanges using appropriate tone, language and syntax • Uses active listening and questioning skills when seeking assistance and confirming information
Navigate the world of work	1.2, 1.6, 2.6, 3.1, 3.2, 5.1-5.3	• Takes personal responsibility for adherence to legal and regulatory responsibilities relevant to own work context and draws attention to any issues that may affect self or others • Adheres to organisational policies and procedures

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		• Considers own role in terms of its contribution to the broader goals of the work environment • May amend workplace protocols to ensure better outcomes
Interact with others	1.3, 1.5, 4.2-4.4, 6.2	• Seeks to cooperate with others to achieve results in immediate work context • May seek guidance from supervisors when required • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3, 1.4, 1.6, 2.1, 2.3, 2.4, 3.4	• Plans routine tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding timing and sequencing • Recognises and responds to predictable routine problems related to role in the immediate work context • Identifies and adapts ideas being used in similar contexts • 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**
BSBEDU302 Assist in resolution of issues and incidents in an international education environment	BSBEDU302A Assist in resolution of issues and incidents in an international education 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

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Assessment Requirements for BSBEDU302 Assist in resolution of issues and incidents in an international education 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:

- respond effectively and appropriately to issues and critical incidents in an international education environment, in accordance with all legislative, regulatory and organisational requirements
- work constructively in a team environment
- update organisational policies and procedures to contribute to ongoing improvements in the workplace
- contribute to organisational capacity to respond to critical incidents.

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 the international education environment and student services requirements
- identify relevant legislative and regulatory requirements
- outline own role and responsibility in relation to incidents.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the educational administration field of work and include access to:

- opportunities to participate in a range of practical exercises and projects
- relevant documentation.

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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

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BSBEDU303 Assist with the provision of international education information

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 organise, maintain and provide information and material relating to education and training programs and associated services to clients of an international education organisation.

It applies to individuals providing information to clients, with some supervision and guidance, in an international education environment. They could be working in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore, public or private.

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

Unit Sector

Administration – Educational Administration

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 client requirements for information provision	1.1 Apply cross-cultural communication skills while providing and receiving information 1.2 Record and respond to requests for information from internal or external clients, in line with organisational policies and

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ELEMENT	PERFORMANCE CRITERIA
	procedures 1.3 Clarify requests to ensure full understanding of client requirements
2 Organise and maintain supplies of material	2.1 Refer to procedures for providing material for planning production, assembly, packaging and distributing information packages 2.2 Assemble material for the needs of individual clients and client groups, according to inventory establishment 2.3 Maintain stocks of material at established inventory levels, and identify and respond to shortfalls 2.4 Facilitate production and collection of material to ensure inventory levels are maintained
3 Provide information relevant to individual clients and client groups	3.1 Provide assembled and checked material to clients at the specified destinations on time, according to organisational policies and procedures 3.2 Facilitate compliance with relevant legislative and regulatory requirements for provision and distribution of material 3.3 Monitor communication and process flow to ensure on-time dispatch of requested material to specified persons and destinations 3.4 Seek advice from relevant personnel in client services situations where information provision may require departure from regular practices
4 Contribute to the continuous improvement process for information provision	4.1 Apply client services policy, guidelines and procedures for information provision when performing work role activities 4.2 Perform work effectively within a team environment to facilitate quality of information provision in client services 4.3 Carry out follow-up to gauge client satisfaction regarding information provision 4.4 Use feedback to promote continuous improvement in own work and for input into organisational quality client services processes for information provision 4.5 Provide input through team communication regarding organisational policies and procedures, and development or review of information provision services to clients

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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, 3.2, 3.3, 4.4, 4.5	• Gathers and interprets a variety of texts including internal policies, legislative and inventory materials
Writing	1.1-1.3, 2.3, 2.4, 3.2-3.4, 4.1, 4.2, 4.3, 4.5	• Uses clear, specific and industry related terminology to complete and update workplace documentation and communicate with others
Numeracy	2.3, 2.4	• Uses basic mathematical techniques to calculate and maintain stock levels
Oral Communication	1.1-1.3, 2.4, 3.3, 3.4, 4.2-4.5	• Articulates information clearly using specific vocabulary, tone and syntax suitable to audience • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	1.2, 3.1, 3.2, 4.1	• Monitors adherence to organisational policies and procedures • Considers own role in terms of its contribution to broader goals of the work environment • Appreciates the implications of legal and regulatory responsibilities related to own work
Interact with others	3.1, 3.4, 4.2-4.5	• 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	2.2-2.4, 3.1	• Plans routine tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding timing and sequencing • Recognises and responds to predictable routine problems related to role in the immediate work context • Automatically implements standard procedures for routine decisions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBEDU303 Assist with the provision of international education information	BSBEDU303A Assist with the provision of international education information	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

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Assessment Requirements for BSBEDU303 Assist with the provision of international education information

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:

- respond to client requests for information according to international education organisational policy and client services procedures
- provide information packs, and maintain stocks of materials, according to organisational procedures and legislative requirements
- monitor client satisfaction and use results to improve own work and as input to the team to improve information provision services.

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 client services information provision job roles in an international education organisation
- explain methods of information organisation, maintenance and provision in international education organisations, including legislative and regulatory compliance issues
- identify relevant organisational policies and procedures
- explain quality client services policy, principles and practices for providing information to internal and external clients of an international education organisation
- outline common types of client information requests.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the educational administration field of work and include access to:

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- opportunities to participate in a range of practical exercises and projects
- 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

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BSBEDU304 Assist with the provision of pastoral care services to international students

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 assist with the provision of pastoral care services to students of an international education organisation. It focuses on the support needs of international students studying on student visas in Australian institutions, onshore and offshore.

It applies to individuals providing pastoral care services to international students, with some supervision and guidance, in an international education provider context. They will be working in the administration of education programs and projects in one or more international education sectors (schools, English language teaching organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore, public or private.

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

Unit Sector

Administration – Educational Administration

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 Identify pastoral care needs of international	1.1 Identify potential pastoral care services requirements of student groups and individuals

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ELEMENT	PERFORMANCE CRITERIA
students	1.2 Identify organisational risk management strategies in providing pastoral care services 1.3 Review organisational surveys of international student expectations and needs
2 Provide advice to international students to meet pastoral care needs, within role parameters	2.1 Identify limitations and parameters of own role in relation to pastoral care specialisations for international students 2.2 Apply cross-cultural communication skills when assisting in a range of student advisory settings 2.3 Refer students to personnel in pastoral care specialisations as applicable 2.4 Communicate information about international student support programs and services to students 2.5 Apply negotiation skills when dealing with difficult situations, in line with role and organisational requirements 2.6 Manage student information and records in compliance with privacy and confidentiality standards 2.7 Consult and debrief with work colleagues
3 Identify compliance with legislative and regulatory requirements, and organisational policies and procedures	3.1 Identify legislative and regulatory requirements for pastoral care services 3.2 Identify organisational policy and procedures for pastoral care services 3.3 Review organisation’s compliance with education and training industry standards and codes for pastoral care services, and report in line with organisational procedures 3.4 Identify and propose adjustments to organisational pastoral care policies and procedures to meet the needs of international students, and report in line with organisational procedures
4 Communicate pastoral care services to clients and stakeholders	4.1 Identify appropriate external pastoral care services and document their contact and service details 4.2 Prepare information about pastoral care services for international students that identifies pastoral care specialisations and external pastoral care services 4.3 Disseminate information about pastoral care services to international students in appropriate formats 4.4 Communicate information on organisational policies and procedures to clients and stakeholders 4.5 Review and monitor access to information and uptake of

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ELEMENT	PERFORMANCE CRITERIA
	pastoral care services by international students 4.6 Identify and propose improvements to communication processes, formats and strategies
5 Contribute to continuous improvement in pastoral care services	5.1 Record and maintain student case notes, in line with organisational requirements 5.2 Develop appropriate student support programs 5.3 Review student uptake of pastoral care services 5.4 Conduct student satisfaction surveys and make recommendations 5.5 Identify and propose improvements for access to and provision of pastoral care services

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, 2.6, 3.1-3.4, 4.1, 4.4-4.6, 5.1, 5.3, 5.4	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and organisational requirements
Writing	1.3, 2.2-2.4, 2.6, 2.7, 3.3, 3.4, 4.1, 4.2, 4.4-4.6, 5.1-5.5	• Produces familiar text types using simple vocabulary, grammatical structures and conventions appropriate to different audiences
Oral Communication	2.2-2.5, 2.7, 3.3, 3.4, 4.1, 4.4, 4.6, 5.2, 5.4, 5.5	• Uses listening and questioning skills to confirm understanding of requirements • Participates in a verbal exchange of ideas and solutions and uses appropriate language and non-verbal features to provide information and engage with others
Navigate the world of work	1.2, 2.1, 2.5, 2.6, 3.1-3.4, 4.4, 5.1	• Monitors adherence to organisational policies and procedures • Appreciates the implications of legal and regulatory responsibilities • Considers own role in terms of its contribution to broader goals of the work environment

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Interact with others	2.1, 2.2-2.5, 2.7, 3.3, 3.4, 4.3, 4.4, 5.4	• Recognises some personal strengths and challenges associated with interacting with others in work contexts • 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, 2.5, 2.6, 4.1, 4.5, 4.6, 5.2-5.5	• Plans routine tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding timing and sequencing • Recognises and responds to predictable routine problems related to role in the immediate work context • Automatically implements standard procedures for routine decisions • Understands the importance of secure information and privacy in relation to own work and begins to take personal responsibility for identifying and managing risk factors

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEDU304 Assist with the provision of pastoral care services to international students	BSBEDU304A Assist with the provision of pastoral care services to international students	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

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Assessment Requirements for BSBEDU304 Assist with the provision of pastoral care services to international students

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 communicate cross-culturally with students of an international education organisation
- provide relevant information and advice to groups and individuals about the provision of pastoral care services to students of an international education organisation, at the appropriate work role level.

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 aspects of pastoral care services offered in a range of international educational organisations
- explain cross-cultural communication principles and protocols
- explain the impact and influence of culture on international student support and pastoral care services
- describe the limitations of responsibility and parameters in terms of pastoral care and incidents
- list relevant organisational policies and procedures
- outline positions and work roles of organisation including responsibilities of pastoral care role, team role and roles of student learning support and counselling services
- list relevant principles and practices of client services and continuous improvement of programs for international student support
- list the legislation and regulations relating to international education services
- describe the types of issues that could concern international students including:
  - student wellbeing and welfare

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- course-related issues
- grievances
- compliance-related issues
- staffing-related issues.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the educational administration field of work and include access to:

- opportunities to participate in a range of practical exercises and projects
- 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

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BSBEDU305 Assist with international education events and programs

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 and support to a team, coordinators and managers by planning, conducting and providing information about events and programs in an international education organisation.

It applies to individuals who assist others to organise events and programs in an international education provider context, with some supervision and guidance. They could be working in administration of education programs and projects in one or more international education sectors (schools, English language teaching organisations, vocational education and training, higher education, postgraduate education).

These organisations could be onshore or offshore, public or private.

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

Unit Sector

Administration – Educational Administration

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 Assist in planning events and programs for	1.1 Participate in team meetings to plan events and programs 1.2 Clarify and record team roles, own work role and task

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ELEMENT	PERFORMANCE CRITERIA
international clients and other stakeholders	responsibilities 1.3 Identify and record requirements for information, material and services during the planning stages 1.4 Complete planning-related tasks on time and in accordance with team and work role requirements 1.5 Implement organisational policy and procedures for facilitating at international education events and programs 1.6 Comply with relevant legislative and regulatory requirements applicable to international education events and programs
2 Assist in preparing for international education events and programs	2.1 Collate and package appropriate information according to the event or program plan 2.2 Check stocks of material for quality and sufficiency, and confirm storage and distribution details 2.3 Report identified shortfalls in material and order, in line with organisational procedures 2.4 Prepare relevant material as needed 2.5 Make arrangements with relevant clients and other stakeholders according to the requirements of the event, program and organisational procedures 2.6 Assist in identifying and arranging supply of required facilities, equipment and material for events and programs 2.7 Assist with booking and confirming domestic and international travel, accommodation and venues as required by particular event or program
3 Make information presentations on international education events and programs	3.1 Prepare to deliver information presentations for specific events and programs, relevant to work role 3.2 Deliver information presentations as required and approved, in line with organisational policy and procedures 3.3 Make improvements to presentations based on feedback from relevant personnel
4 Contribute to international education events and programs	4.1 Check and arrange delivery of required material and equipment to specified client or other stakeholder destinations on time and in line with organisational policy and procedures 4.2 Ensure relevant legislative and regulatory requirements are met in relation to the distribution of goods and material 4.3 Monitor communication and process flow to ensure on-time dispatch of requested material and resources for events and

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ELEMENT	PERFORMANCE CRITERIA
	programs to specified persons and destinations 4.4 Provide assistance to event or session presenters to facilitate smooth presentations 4.5 Provide assistance and support to clients and stakeholders, as needed, during events and programs 4.6 Seek advice from relevant personnel if situations or issues arise that require departure from regular practices
5 Contribute to continuous improvement processes for international education events and programs	5.1 Follow organisational policies and procedures for facilitating events and programs, in accordance with work role activities 5.2 Apply cross-cultural communication skills and strategies to facilitate events and programs 5.3 Perform work effectively within a team environment to assist facilitation of events and programs 5.4 Assist in determining client satisfaction regarding event and program outcomes 5.5 Use feedback from stakeholders to promote continuous improvement in own work 5.6 Provide input to organisational policy and procedures review and development on facilitation of events 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	Performance Criteria	Description
Reading	1.3, 1.4, 2.1-2.3, 2.5-2.7, 3.1, 3.2, 4.1-4.3, 5.1, 5.6	• Interprets textual information obtained from a range of sources and determines how content may be applied
Writing	1.2-1.5, 2.1-2.5, 2.7, 3.1-3.3, 4.1, 5.2, 5.6	• Uses clear, specific and industry-related terminology, appropriate cultural references and common grammatical structures to complete and update workplace documentation and communicate with specific audiences
Oral	1.1, 1.2, 2.2, 2.3, 2.5-2.7, 3.2, 3.3, 4.1,	• Uses active listening and questioning skills to confirm understanding for requirements

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Communication	4.4-4.6, 5.2-5.6	• Participates in a variety of verbal exchanges to present or clarify information using language and non-verbal features appropriate to audience and context
Numeracy	2.2, 2.3, 2.6, 4.1	• Uses basic mathematical skills to calculate and organise the supply of adequate resources
Navigate the world of work	1.5, 1.6, 2.5, 3.2, 4.2, 5.1	• Considers own role in terms of its contribution to broader goals of the work environment • Monitors adherence to relevant legislation, organisational policies and procedures
Interact with others	1.1, 3.2, 4.4, 4.5, 5.3-5.5	• Plays an active role in workgroup discussions, paying some attention to the perspectives of others • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.3, 1.4, 2.1, 2.2, 2.5-2.7, 3.1, 4.1, 4.3	• Plans tasks using logically sequenced steps, reflecting an awareness of time and resource constraints and the needs of others • Recognises and responds to predictable routine problems related to role in immediate work context • Automatically implements standard procedures for routine decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEDU305 Assist with international education events and programs	BSBEDU305A Assist with international education events and programs	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

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Assessment Requirements for BSBEDU305 Assist with international education events and programs

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 cross-cultural communication strategies in relation to international education events and programs
- assist with planning and facilitating international education events and programs.

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 types, purposes and formats of international education events and programs
- list relevant internal and external clients, presenters and support people involved in managing and participating in events and programs
- describe coordinator and team roles for planning and facilitating events and programs
- outline travel and accommodation requirements for international education events and programs explain information presentation techniques
- outline the methods used to provide and distribute information
- identify relevant legislative and regulatory compliance issues in relation to facilitating international education events and programs
- outline relevant organisational policy and procedures
- describe resource requirements for international education events and programs
- explain the importance of team behaviour and participation during events and programs.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the educational administration field of work and include access to:

- opportunities to participate in a range of practical exercises and projects
- 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

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BSBEMS401 Develop and implement business development strategies to expand client base

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 prospecting strategies to expand the client base of organisations or enterprises seeking to employ individuals.

It applies to individuals working in support roles in either a public or private employment services agency.

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

Unit Sector

Workforce Development – Recruitment and Employment Services

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 Develop strategies to identify potential clients	1.1 Undertake research to identify potential clients 1.2 Develop marketing and promotional plans to target potential clients 1.3 Use prospecting methods to target potential clients 1.4 Review and evaluate strategies for effectiveness

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ELEMENT	PERFORMANCE CRITERIA
2 Initiate relationships with potential clients	2.1 Develop communication strategies to effectively liaise with potential clients 2.2 Identify and analyse client business and legislative requirements 2.3 Discuss and negotiate client business requirements 2.4 Prepare a tender and proposal to meet negotiated client business requirements 2.5 Present organisation's proposal to the client
3 Manage client relationship	3.1 Make follow-up contact with the client 3.2 Negotiate business requirements to ensure client satisfaction with the service to be provided 3.3 Adapt proposal to client as required 3.4 Develop contract with client
4 Utilise networks to expand client base	4.1 Review and assess established networks for effectiveness in assisting to identify potential clients 4.2 Use appropriate communication strategies to utilise networks to identify potential clients 4.3 Use networks to identify and build relationships with potential clients 4.4 Identify benefits of networks and other relationships in expanding the client base

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, 2.2, 4.1	• Identifies and analyses information from a range of sources to identify potential clients and their requirements
Writing	1.2, 1.4, 2.1, 2.2, 2.4, 3.3, 3.4	• Produces and amends documents in required formats using appropriate business language
Oral	1.3, 2.3, 2.5, 3.1,	• Present ideas or persuasive arguments using

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Communication	3.2, 3.4, 4.2	vocabulary and non-verbal features appropriate to the audience • Asks questions and listens carefully to gather, interpret or evaluate information
Navigate the world of work	2.2	• Applies workplace protocols, legislation or regulations relevant to own responsibilities
Interact with others	1.3, 2.3, 2.5, 3.1, 3.2, 3.4, 4.2-4.4	• Selects and uses appropriate conventions and protocols when communicating with others • Participates in conversations relevant to role responding, explaining, negotiating and persuading as required • Actively seeks to establish and maintain effective business relationships with potential and current clients
Get the work done	1.1, 1.2, 1.4, 2.1	• Takes responsibility for planning and implementing tasks for efficient and effective outcomes • Uses systematic, analytical processes to evaluate information and make decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEMS401 Develop and implement business development strategies to expand client base	BSBEMS401B Develop and implement business development strategies to expand client base	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

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Assessment Requirements for BSBEMS401 Develop and implement business development strategies to expand client base

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 implement at least one documented plan for gaining new clients
- document communication strategies to develop and maintain client relationships
- demonstrate techniques to expand a client base using client network/s.

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 the key provisions of relevant legislation, regulations, standards and codes of practice that affect business development strategies
- describe recruitment methods used to attract new clients
- identify the range of organisational products and services supplied by employment agencies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – recruitment and employment services field of work and include access to:

- office equipment and resources
- examples of workplace documents used in employment services agencies.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBEMS402 Develop and implement strategies to source and assess candidates

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 strategies to source candidates and to assess their suitability for available positions.

It applies to individuals working in a support role in an employment services agency.

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

Unit Sector

Workforce Development – Recruitment and Employment Services

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 Develop strategies to source candidates	1.1 Undertake research to identify potential candidate channels 1.2 Identify a range of strategies to assist in sourcing candidates 1.3 Review and evaluate strategies for effectiveness 1.4 Develop advertisement copy to align with client requirements, job specifications and place accordingly to attract candidates
2 Screen and interview potential candidates	2.1 Undergo preliminary screening with candidates in a fair and equitable manner, in compliance with relevant legislation

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Organise and conduct interviews and employment appraisal assessments in accordance with organisational policy and best practice 2.3 Undertake general assessment of raw skills as required, depending on the position 2.4 Obtain additional information from candidates as required
3 Assess and select candidates	3.1 Conduct assessment and selection process in accordance with organisational policy and legislative requirements, and in consultation with the client 3.2 Judge information obtained from each candidate against specified selection criteria and note any additional influencing factors 3.3 Align candidate suitability to specific client requirements and job specifications, in consultation with the client 3.4 Prepare selection recommendations for the client and document in accordance with organisational procedures
4 Manage candidate outcomes	4.1 Inform all candidates of selection decisions in a timely manner 4.2 Provide feedback to unsuccessful candidates 4.3 Provide successful candidate with briefing and coaching for interview with client 4.4 Negotiate placements with candidate and client

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, 2.1-2.3, 3.1-3.4	• Interprets a range of textual information from a variety of sources and analyses and reviews for compliance and suitability
Writing	1.1, 1.4, 2.1, 2.2, 3.2-3.4, 4.1-4.3	• Prepares concise notes to help synthesise information sourced during research • Produces reports and other business communication for a range of contexts and audiences using relevant language and structure

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Oral Communication	2.1-2.4, 3.1, 3.3, 4.1-4.4	• Asks questions and listens carefully to gather, interpret or evaluate information • Participates in verbal exchanges using clear language and appropriate tone to provide relevant information and feedback
Navigate the world of work	1.4, 2.1, 2.2, 3.1-3.4	• Applies workplace protocols, legislation or regulations relevant to own responsibilities
Interact with others	2.1, 2.2, 2.4, 3.1, 3.3, 4.1-4.4	• Selects and uses appropriate conventions and protocols when communicating with candidates or clients • Participates in conversations relevant to role responding, explaining, negotiating and persuading as required
Get the work done	1.1-1.3, 2.2-2.3, 3.2-3.4, 4.1	• Takes responsibility for planning and implementing tasks for efficient and effective outcomes • Uses systematic, analytical processes to evaluate information and make decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBEMS402 Develop and implement strategies to source and assess candidates	BSBEMS402B Develop and implement strategies to source and assess candidates	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

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Assessment Requirements for BSBEMS402 Develop and implement strategies to source and assess candidates

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:

- produce a written or verbal presentation on strategies for sourcing candidates
- demonstrate the process for screening and interviewing a candidate
- provide a written report or demonstration of an assessment of a candidate's skills and selection recommendation
- communicate effectively with clients and successful and unsuccessful candidates.

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 economic, social and industry trends affecting employment levels
- describe the key provisions of relevant legislation, regulations, standards and codes of practice that affect employment agencies
- describe a range of interview techniques and recruitment sourcing methods
- describe the range of organisational products and services supplied by employment agencies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – recruitment and employment services field of work and include access to:

- office equipment and resources
- examples of workplace documents used in employment services agencies.

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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

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BSBEMS403 Develop and provide employment management services to candidates

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 employment services to candidates that assist in the retention and management of candidates by the organisation.

It applies to individuals working in an assistant capacity in either a public or private employment services agency.

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

Unit Sector

Workforce Development – Recruitment and Employment Services

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 Develop strategies for retention of candidates	1.1 Analyse current candidate information 1.2 Identify candidate and legislative requirements 1.3 Identify a range of strategies to meet candidate and legislative requirements 1.4 Evaluate and assess products and services for candidates

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Establish and implement methods of monitoring candidate retention
2 Provide advice and support to candidates	2.1 Provide services including résumé counselling and preparation 2.2 Provide career advice and counselling to candidates 2.3 Undertake candidate induction in accordance with client requirements, organisational policy and Work Health and Safety (WHS) compliance requirements 2.4 Provide advice and information on legislative industrial relations matters, WHS and employment issues to candidates
3 Provide training solutions to candidates	3.1 Identify and document candidates' training needs, including WHS 3.2 Undertake research to identify suitable training programs available to address candidates' identified training need 3.3 Provide advice to candidates on training options available 3.4 Provide relevant internal training to meet candidate requirements if required, in accordance with organisational policies and legislative requirements 3.5 Access relevant external training to meet candidates' requirements if required, in accordance with organisational policies and legislative requirements 3.6 Review implementation of client training plan with client to ensure needs are met
4 Develop strategies for ongoing management of candidates	4.1 Establish monitoring strategies to determine issues in service delivery to candidates 4.2 Provide post placement support to candidates 4.3 Develop strategies to evaluate the effectiveness of the employment management services 4.4 Develop and document recommendations to improve management services 4.5 Modify and/or expand management services as appropriate to incorporate recommendations

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 2.1, 2.3, 2.4, 3.1, 3.2, 3.4-3.6	• Interprets and analyses textual information including legislative requirements from a range of sources
Writing	3.1, 3.4, 4.3, 4.4	• Prepares concise notes based on information sourced during research • Produces reports and other business communication for a range of contexts and audiences using relevant language, tone and structure
Oral Communication	2.1-2.4, 3.3, 3.4, 4.2	• Participates in a range of verbal exchanges using clear and detailed language and appropriate tone to provide information and training • Asks questions and listens carefully to gather, interpret or evaluate information
Navigate the world of work	2.3, 2.4, 3.1, 3.4, 3.5	• Adheres to legal responsibilities and organisational policies and procedures relevant to own work • Understands the nature and purpose of own role and associated responsibilities
Interact with others	2.1-2.4, 3.3, 3.4, 4.2	• Selects and uses appropriate conventions and protocols when communicating with candidates • Participates in conversations relevant to role responding, explaining and supporting as required
Get the work done	1.1-1.5, 2.1, 2. 3, 3.1, 3.2, 4.1, 4.2	• Takes responsibility for planning and implementing tasks for efficient and effective outcomes • Uses systematic, analytical processes to evaluate current practices and recommend improvements

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBEMS403 Develop and provide employment management services to candidates	BSBEMS403B Develop and provide employment management services to candidates	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBEMS403 Develop and provide employment management services to candidates

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:

- produce a written report about:
  - retention development strategies
  - training and support options for candidates in accordance with legislative and organisational requirements
- communicate effectively with candidates for training, induction and professional development purposes
- identify improvements for future management services.

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 provisions of relevant legislation, regulations, standards and codes of practice that affect employment agencies
- summarise important policies and procedures relevant to retaining and managing an organisation’s candidate base
- describe the range of organisational products and services supplied to clients by employment agencies
- identify and describe a range of training options and solutions for candidates
- identify and describe a range of techniques used in training, coaching and mentoring candidates.

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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 workforce development – recruitment and employment services field of work and include access to:

- office equipment and resources
- examples of workplace documents used in employment services agencies.

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

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BSBEMS404 Manage the recruitment process for client organisations

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 strategies to source, manage and assess candidates for placement purposes.

It applies to individuals working in a support role in either a public or private employment services agency.

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

Unit Sector

Workforce Development – Recruitment and Employment Services

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 Provide advice on recruitment strategy to client	1.1 Provide advice and information to client on workforce planning and performance management systems and issues 1.2 Provide advice and information to client to assist in developing and/or evaluating a recruitment strategy and processes 1.3 Identify and determine effective and accurate performance indicators 1.4 Discuss and agree with client, recommendations for necessary

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ELEMENT	PERFORMANCE CRITERIA
	assessments and profiling 1.5 Identify and analyse performance gaps as part of workforce planning 1.6 Evaluate forms, procedures and induction processes for continuous improvement
2 Determine job specifications with client	2.1 Undertake job analysis with client to determine needs and requirements for recruitment, in line with organisational recruitment strategy 2.2 Provide advice to client on issues such as salary, conditions and legislative requirements 2.3 Write clear and concise specifications which accurately reflect the job role within client's organisation, and comply with relevant legislative requirements and organisational format 2.4 Confirm specifications with appropriate personnel prior to undertaking recruitment
3 Manage recruitment process	3.1 Develop a selection plan and criteria based on the job specification, performance gaps and organisational needs, in consultation with client 3.2 Write and place recruitment advertisements in relevant media in accordance with job specifications, organisational policy and legislative requirements 3.3 Employ strategies to source potential candidates 3.4 Organise and conduct job interviews and employment appraisals in accordance with organisational policy and legislative requirements
4 Assess and select candidates	4.1Judge information obtained from each candidate against specified selection criteria and note any additional influencing factors 4.2 Conduct assessment and selection process in accordance with organisational policy and legislative requirements 4.3 Shortlist suitable candidates for client interview
5 Refer candidates and complete placement process	5.1 Recommend candidates best suited to selection criteria to client for interview, and create and forward candidate profiles to client 5.2 Provide advice and support to candidates with résumé preparation, interview preparation and presentation to the client 5.3 Inform all candidates promptly and accurately of selection decisions

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Conduct job offer to successful candidate 5.5 Complete placement follow up

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, 1.5, 1.6, 2.1, 2.3, 3.1, 3.2, 3.4, 4.1, 4.2	• Interprets and analyses textual information from a variety of sources for relevance, suitability and compliance
Writing	1.1-1.3, 2.2-2.4, 3.1, 3.2, 4.1-4.3, 5.1-5.5	• Prepares concise notes to help synthesise information during analysis and assessment phase • Produces reports and other business communication for a range of contexts and audiences using relevant language, tone and structure
Oral Communication	1.1, 1.2, 1.4, 2.1, 2.2, 2.4, 3.1, 3.4, 5.2-5.4	• Uses active listening and questioning techniques to elicit and assess relevant information • Participates in a range of verbal exchanges using clear and detailed language and appropriate tone to provide relevant information, opinion and training
Navigate the world of work	2.2, 2.3, 3.2, 3.4, 4.2	• Adheres to legal responsibilities and organisational policies and procedures relevant to own work
Interact with others	1.4, 2.2, 2.4, 3.1, 5.2-5.4	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Takes some steps to vary content, structure, style, tone and vocabulary to suit the needs of familiar audiences
Get the work done	1.1-1.6, 2.1, 2.3, 2.4, 3.1- 3.4, 4.1, 4.2, 5.1, 5.3, 5.5	• Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes • Systematically analyses information to make decisions and recommendations

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBEMS404 Manage the recruitment process for client organisations	BSBEMS404B Manage the recruitment process for client organisations	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

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Assessment Requirements for BSBEMS404 Manage the recruitment process for client organisations

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:

- produce reports containing strategic recruitment advice
- create well-developed job specifications and selection plans
- analyse, assess and select candidates for specific positions explaining reasons for preferred candidates
- communicate effectively with candidates for training and professional development purposes
- identify improvements for future management services.

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 provisions of relevant legislation, regulations, standards and codes of practice that affect employment agencies
- summarise key organisational policies and procedures affecting recruitment processes
- describe the range of organisational products and services used in recruitment processes for client organisations
- describe a range of recruitment sourcing methods, strategies and techniques
- outline a range of workforce planning and performance management systems
- summarise techniques used to assess the competency of individuals.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – recruitment and employment services field of work and include access to:

- office equipment and resources
- examples of workplace documents used in employment services agencies.

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

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BSBFIA301 Maintain financial records

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 maintain daily financial records such as reconciling debtors' and creditors' systems, preparing and maintaining a general ledger and trial balance and includes activities associated with monitoring cash control for accounting purposes.

It applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts and may exercise discretion and judgement using appropriate theoretical knowledge of financial records.

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

Unit Sector

Finance – Financial Administration

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 Maintain daily financial records	1.1 Correctly maintain daily financial records in accordance with organisational and legislative requirements for accounting purposes 1.2 Identify and rectify or refer discrepancies or errors in documentation or transactions to designated persons in accordance with organisational and legislative requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Accurately credit and debit transactions and promptly enter into journals in accordance with organisational and legislative requirements
2 Maintain general ledger	2.1 Maintain general ledger in accordance with organisational and legislative requirements 2.2 Post transactions into general ledger in accordance with organisational and legislative reporting requirements 2.3 Reconcile systems for accounts payable and receivable with general ledger 2.4 Accurately prepare trial balance from general ledger in accordance with organisational and legislative requirements
3 Monitor cash control	3.1 Ensure cash flow is accurately accounted for in accordance with organisational and legislative requirements 3.2 Make and receive payments in accordance with organisational and legislative requirements 3.3 Collect or follow up outstanding accounts within designated timelines 3.4 Check payment documentation for accuracy of information and despatch to creditors within designated timeline

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, 2.1-2.4, 3.1-3.4	• Recognises and interprets numerical and textual information to determine and complete required activities
Writing	1.3, 2.1-2.4, 3.1-3.4	• Integrates data from different sources and records numerical information in a format appropriate to context and purpose of material • Prepares clear and detailed information and instructions using format, structure and tone suitable to audience
Oral	1.2, 3.2, 3.3	• Explains financial issues and requirements clearly, using facts and examples, and uses listening and

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Communication		questioning techniques to obtain sequenced instructions
Numeracy	1.1-1.3, 2.1-2.4, 3.1-3.4	• Uses a limited range of mathematical calculations to reconcile amounts using whole numbers and decimals and arrange/compare numerical information
Navigate the world of work	1.1-1.3, 2.1-2.4, 3.1-3.3	• Recognises, understands and monitors adherence to legislative and organisational requirements in undertaking own work
Interact with others	3.3, 3.4	• Understands the importance of using appropriate practices and protocols when handling confidential information
Get the work done	1.1-1.3, 2.1-2.4, 3.1-3.4	• Takes responsibility for own workload and monitors adherence to specified goals and timelines • Uses digital technologies to access, record, store, organise and compile data as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA301 Maintain financial records	BSBFIA301A Maintain financial records	Updated to meet Standards for Training Packages Minor edits to clarify meaning of performance criteria	Equivalent unit

Links

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

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Assessment Requirements for BSBFIA301 Maintain financial records

Modification History

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

Performance Evidence

Evidence of the ability to:

- maintain daily transactions and identify and respond to discrepancies and errors
- transfer and record financial data accurately
- reconcile expenditures and revenue in a timely manner.

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 the key provisions of relevant legislation, codes of practice and national standards that may affect financial record keeping
- discuss organisational policies and procedures relating to maintaining financial records
- define credits/creditors and debits/debtors
- describe principles of double entry bookkeeping and accrual accounting
- identify methods of presenting financial data.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources
- computer equipment and relevant software
- examples of source documents relating to financial record keeping
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBFIA302 Process payroll

Modification History

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

Application

This unit describes skills and knowledge required to process payroll from provided data using manual and computerised payroll systems.

It 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

Finance – Financial Administration

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 Record payroll data	1.1 Check payroll data and clarify discrepancies with designated persons 1.2 Enter employee pay period details and any deductions and allowances in payroll system in accordance with source documents 1.3 Calculate payment due to individual employees to reflect standard pay and variations in accordance with employee source

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ELEMENT	PERFORMANCE CRITERIA
	data
2 Prepare payroll	2.1 Prepare payroll within designated timelines and in accordance with organisational policy and procedures 2.2 Reconcile total wages for pay period, check or correct irregularities or refer to designated persons for resolution 2.3 Make arrangements for payment in accordance with organisational and individual requirements 2.4 Obtain authorisation of payroll and individual pay advice in accordance with organisational requirements 2.5 Produce, check and store payroll records in accordance with 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 in accordance with organisational and legislative requirements 3.2 Provide information in accordance with 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 in accordance with organisational policy 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1-2.6, 3.1-3.4	• Interprets a range of textual information to determine activities required
Writing	1.1-1.3, 2.1-2.6, 3.1-3.4	• Accurately records textual information and maintains personal and banking details using format, language and structure in context

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Oral Communication	1.1, 3.1-3.4	• Explains financial issues clearly using terminology and tone appropriate to audience • Uses questioning and listening skills in verbal exchanges to clarify information
Numeracy	1.1-1.3, 2.1, 2.2, 2.5. 3.1-3.3	• Uses a limited range of mathematical calculations to calculate and reconcile amounts and arrange/compare numerical information
Navigate the world of work	1.2, 1.3, 2.1, 2.3-2.6, 3.1, 3.2, 3.4	• Adheres to legislative requirements and organisational policies and procedures relevant for own work
Interact with others	1.1, 2.2, 3.1-3.3	• Selects the appropriate mode of communication for a specific purpose • Collaborates with others to achieve predetermined goals
Get the work done	1.1-1.3, 2.1-2.6, 3.2, 3.4	• Takes responsibility for own workload and monitors adherence to specified goals and timelines • Recognises and takes responsibility for resolving problems relevant to own role • Takes responsibility for routine low-impact decisions within familiar situations • Uses digital technologies to access, record, store, organise and compile data as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA302 Process payroll	BSBFIA302A Process payroll	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

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Assessment Requirements for BSBFIA302 Process payroll

Modification History

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

Performance Evidence

Evidence of the ability to:

- plan and perform payroll calculations in accordance with all legislative and organisational requirements, and predetermined timelines
- refer enquiries outside area of responsibility to an appropriate authority.

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 the key provisions of relevant legislation, standards and codes of practice that may affect payroll operations
- outline relevant organisational policies and procedures
- list the different types of payroll systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources
- computer with relevant software
- payroll data (samples or actual
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBFIA303 Process accounts payable and receivable

Modification History

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

Application

This unit describes skills and knowledge required to maintain accounts payable and accounts receivable records, including processing payments to creditors and handling overdue accounts receivable.

It applies to individuals employed in a range of work environments supporting the accounting functions and aspects of an enterprise. They may provide administrative support within an enterprise, or may 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

Finance – Financial Administration

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 Maintain financial journal systems	1.1 Check source documents for accuracy and appropriate authorisation 1.2 Refer errors and discrepancies in source documents for resolution in accordance with organisational policy and procedures 1.3 Enter transactions into cash and credit journal system in accordance with organisational policy and procedures and relevant

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ELEMENT	PERFORMANCE CRITERIA
	legislation and compliance requirements 1.4 Total credit journals in accordance with organisational policy and procedures
2 Prepare bank reconciliations	2.1 Check cash journals against bank statements to identify differences 2.2 Update cash journals with relevant data from bank statement/s 2.3 Identify discrepancies and refer to appropriate staff member, organisation or agency 2.4 Total cash journals in accordance with organisational policy and procedures 2.5 Prepare regular reconciliation reports within designated timelines
3 Maintain accounts payable and accounts receivable systems	3.1 Enter transactions into individual accounts payable and accounts receivable in accordance with organisational policy and procedures and accounting requirements 3.2 Prepare schedules of accounts payable and accounts receivable for reconciliation purposes and in accordance with organisational requirements 3.3 Reconcile accounts payable and accounts receivable schedules with journal data or general ledger and in accordance with organisational requirements
4 Process payments for accounts payable	4.1 Reconcile accounts payable statements with accounting records and in accordance with organisational policy and procedures 4.2 Check payment documentation for accuracy of information and discrepancies and rectify errors in accordance with organisational requirements
5 Prepare statements for accounts receivable	5.1 Produce and check accounts receivable statements for accuracy in accordance with organisational policy and procedures 5.2 Rectify discrepancies and statements despatched within designated timelines
6 Follow up outstanding accounts	6.1 Maintain accounts receivable ledger system in accordance with organisational requirements and to reflect current credit situation 6.2 Conduct aged-analysis of accounts receivable to identify outstanding accounts and to determine collection procedures in accordance with organisational requirements 6.3 Report or follow up outstanding accounts in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational policy and procedures 6.4 Monitor and review credit terms in accordance with credit policy 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	Performance Criteria	Description
Reading	1.1-1.4, 2.1-2.5, 3.1-3.3, 4.1, 4.2, 5.1, 5.2, 6.1-6.4	• Interprets textual information from a range of sources to confirm all necessary job requirements • Checks documents to identify errors or discrepancies
Writing	1.2-1.4, 2.1-2.5, 3.1-3.3, 4.1, 4.2, 5.2, 6.1-6.4	• Prepares a range of clear documentation using relevant format, grammatical structure and vocabulary suitable to audience
Oral Communication	1.2, 2.3, 6.3	• Uses questioning and listening techniques to clarify information • Explains information clearly using appropriate terminology and tone
Numeracy	1.1-1.4, 2.1-2.5, 3.1-3.3, 4.1, 4.2, 5.1, 5.2, 6.1-6.4	• Uses a limited range of mathematical calculations to reconcile amounts using whole numbers and decimals • Arranges/compares numerical information
Navigate the world of work	1.1-1.4, 2.4, 2.5, 3.1-3.3, 4.1, 4.2, 5.1, 5.2, 6.1-6.4	• Appreciates implications of legal and regulatory responsibilities related to own work
Interact with others	1.2, 2.3, 6.3	• Seeks the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Plays an active role in workgroup discussions, paying some attention to the perspective of others
Get the work done	1.2-1.4, 2.1-2.5, 3.1-3.3, 4.1-4.3, 5.1, 5.2, 6.1-6.4	• Plans a range of routine and non-routine tasks recognising stated goals and aiming to achieve them within specified timeframes • Recognises predictable problems and applies formal problem-solving processes or seeks advice from

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		others, as relevant • Automatically implements standard procedures for routine decisions • Uses digital technologies to access, record, store, organise and compile data and present reports as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA303 Process accounts payable and receivable	BSBFIA303 Process accounts payable and receivable	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

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Assessment Requirements for BSBFIA303 Process accounts payable and receivable

Modification History

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

Performance Evidence

Evidence of the ability to:

- accurately enter data into journal and subsidiary ledger system
- maintain journals and subsidiary ledger systems
- reconcile subsidiary ledger system with journal or general ledger data
- complete all tasks in accordance with legal and organisational responsibilities, within scope of own responsibility.

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:

- list key provisions of relevant legislation and regulations, standards and codes of practice that may affect aspects of financial operations
- briefly describe the organisational accounting systems and procedures
- explain how to check for errors or discrepancies
- list and describe tasks that are outside own scope of responsibility.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources
- computer equipment and relevant software
- examples of cash journals, credit journals, accounts payable and accounts receivable subsidiary legers

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- workplace reference materials such procedural manuals and company policy
- 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

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BSBFIA304 Maintain a general ledger

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 maintain a computerised or manual general ledger system within an organisation, including processing journal entries and preparing a trial balance.

It 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 general ledger maintenance.

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

Unit Sector

Finance – Financial Administration

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 Process journal entries	1.1 Prepare general journal entries from source journals in accordance with accounting requirements, organisational policy, procedures and legislative accounting standards 1.2 Post journal entries into general ledger system in accordance with organisational policy, procedures and accounting standards 1.3 Reconcile accounts payable and accounts receivable subsidiary

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ELEMENT	PERFORMANCE CRITERIA
	ledger systems with general ledger 1.4 Ensure processing maintains the accounting equation and is completed within designated timelines
2 Prepare a trial balance	2.1 Prepare trial balance of general ledger system in accordance with organisational requirements and accounting standards, and ensure it is checked for accuracy 2.2 Identify and rectify irregularities or refer them for resolution when trial balance does not balance, in accordance with organisational policy 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1, 2.2	• Interprets a range of textual information to determine all job requirements
Writing	1.1-1.3, 2.1, 2.2	• Integrates data from different sources and records numerical information in a suitable format for context and purpose of material • Uses factual and suitable financial language to refer issues and inconsistencies in data
Oral Communication	2.2	• Explains issues clearly using industry-specific and factual vocabulary
Numeracy	1.1-1.3, 2.1, 2.2	• Uses a limited range of mathematical calculations to reconcile amounts and arrange/compare numerical information
Navigate the world of work	1.1, 1.2, 2.1, 2.2	• Recognises, understands and applies applicable industry standards and organisational policies and procedures in the conduct of own work
Interact with others	2.2	• Recognises the strengths and expertise of others and seeks their assistance as required
Get the work done	1.1-1.4, 2.1, 2.2	• Plans and completes tasks according to set guidelines and timelines • Recognises and addresses problems in the context of

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		own work and seeks advice from others, as necessary • Uses digital technologies to access, record, store, organise and compile data as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA304 Maintain a general ledger	BSBFIA304A Maintain a general ledger	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

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Assessment Requirements for BSBFIA304 Maintain a general ledger

Modification History

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

Performance Evidence

Evidence of the ability to:

- accurately enter data
- reconcile subsidiary ledger systems with general ledger and prepare a trial balance
- implement double-entry principles
- systematically trace errors or refer them to appropriate people
- complete all tasks in accordance with accounting principles, legal and organisational responsibilities, and within scope of own responsibility.

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:

- list key provisions of relevant legislation and regulations, standards and codes of practice that may affect aspects of financial operations
- briefly describe the organisational accounting systems and procedures
- explain how to check for errors or discrepancies
- list and describe tasks that are outside own scope of responsibility.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources
- computer equipment and relevant software

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- examples of source journals
- 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

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BSBFIA401 Prepare financial reports

Modification History

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

Application

This unit describes skills and knowledge required to record general journal adjustment entries and to prepare end of period financial reports.

It 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 enterprise, 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

Finance – Financial Administration

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 Maintain asset register	1.1 Prepare a register of property, plant and equipment from fixed asset transactions in accordance with legislative and organisational policy and procedures 1.2 Determine method of calculating depreciation in accordance with organisational requirements 1.3 Maintain asset register and associated depreciation schedule in accordance with organisational policy, procedures and accounting

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ELEMENT	PERFORMANCE CRITERIA
	requirements
2 Record general journal entries for balance day adjustments	2.1 Record depreciation of non-current assets and disposal of fixed assets in accordance with organisational policy, procedures and accounting requirements 2.2 Adjust expense accounts and revenue accounts for prepayments and accruals 2.3 Record bad and doubtful debts in accordance with organisational policy, procedures and accounting requirements 2.4 Adjust ledger accounts for inventories, if required, and transfer to final accounts
3 Prepare final general ledger accounts	3.1 Make general journal entries for balance day adjustments in general ledger system in accordance with organisational policy, procedures and accounting requirements 3.2 Post revenue and expense account balances to final general ledger accounts system 3.3 Prepare final general ledger accounts to reflect gross and net profits for reporting period
4 Prepare end of period financial reports	4.1 Prepare revenue statement in accordance with organisational requirements to reflect operating profit for reporting period 4.2 Prepare balance sheet to reflect financial position of business at end of reporting period 4.3 Identify and correct, or refer errors for resolution in accordance with organisational policy 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.3	• Identifies and interprets information from organisational policies, procedures and job requirements • Checks documents for errors or discrepancies
Writing	1.1, 1.3, 2.1-2.4,	• Records accurate data using relevant format, structure

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	3.1-3.3, 4.1-4.3	and vocabulary
Oral Communication	4.3	• Explains issues clearly using appropriate industry terminology • Asks questions and listens to responses to clarify understanding
Numeracy	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.2	• Uses a wide range of mathematical calculations to interpret and arrange/compare numerical information
Navigate the world of work	1.1-1.3, 2.3, 2.4, 3.1, 4.1	• Adheres to industry standards, organisational policies and procedures in the conduct of own work
Interact with others	4.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.3, 2.1-2.3, 3.2, 3.3, 4.1-4.3	• Plans and completes tasks according to set guidelines and timelines • Recognises and addresses problems in the context of own work and seeks advice from others, as necessary • Uses digital technologies to access, record, store, organise and compile data as required

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.

Revenue statement comprises:	• cost of goods sold if applicable • gross profit • operating net profit • unclassified adjusted expenses and revenue
Balance sheet comprises:	• narrative or T format • unclassified assets and liabilities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA401 Prepare	BSBFIA401A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
financial reports	Prepare financial reports	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

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Assessment Requirements for BSBFIA401 Prepare financial reports

Modification History

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

Performance Evidence

Evidence of the ability to:

- produce a detailed asset register and depreciation schedule
- accurately record entries for balance day adjustments
- prepare financial reports
- trace and reconcile errors systematically or seek expert advice if required
- apply double-entry principles
- complete all tasks according to organisational policies and industry standards .

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 double-entry bookkeeping principles
- identify general journal and general ledger entries
- list the key provisions of relevant legislation, regulations, standards and codes of practice that may preparation of financial reports
- describe organisational accounting systems
- outline relevant organisational policies, procedures and accounting standards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources

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- computer equipment and relevant software
- relevant standards
- samples of financial data
- workplace reference materials such procedural manuals and company policy
- 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

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BSBFIA402 Report on financial activity

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 report financial activity for business both in response to client requests and to meet statutory requirements such as the completion of financial reports.

This unit applies to individuals with a broad knowledge of financial activities who contribute financial skills and knowledge to address reporting requirements of clients and legal authorities. 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

Finance – Financial Administration

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 Compile financial information and data	1.1 Collect, evaluate and code current financial data to ensure consistency, quality and accuracy in accordance with organisational requirements 1.2 Use conversion and consolidation procedures to compile analysis in accordance with organisational requirements 1.3 Make, record and disclose asset and liability valuations in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational requirements 1.4 Ensure that discrepancies, unusual features or queries are identified, resolved or referred to the appropriate authority
2 Prepare statutory requirement reports	2.1 Correctly record income and expenditure to ensure compliance with statutory requirements 2.2 Calculate liabilities for tax in accordance with current legislation and revenue gathering practices 2.3 Correctly identify relevant receipts, revenue documentation and payments 2.4 Ensure that statements and claims take full advantage of available benefits and allowances in accordance with statutory requirements 2.5 Submit statutory requirement reports to appropriate authorities within stated deadlines
3 Provide financial business recommendations	3.1 Ensure that recommendations are logically derived and supported by evidence in report 3.2 Provide recommendations to propose constructive actions to enhance the effectiveness and efficacy of functions and services 3.3 Ensure recommendations are concise and facilitate direction and control of organisation's operations 3.4 Identify and prioritise significant issues in statements including comparative financial performances for review and decision making 3.5 Ensure structure and format of reports are clear and conform to organisational and statutory requirements

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, 2.1-2.5, 3.1-3.5	• Compares and analyses information from a range of sources varying in complexity to determine and complete financial requirements
Writing	1.1-1.4, 2.1, 2.2, 2.4,	• Records numerical and textual information incorporating required financial language organising

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	2.5, 3.1-3.5	data in a manner that supports the format and purpose of the document
Oral Communication	1.4, 3.2, 3.3	• Presents financial issues and requirements clearly, succinctly and based on own findings using language appropriate to audience and environment • Exchanges and obtains information from others by listening and questioning
Numeracy	1.1-1.4, 2.1-2.5, 3.1, 3.4, 3.5	• 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/compare numerical information in order to comply with requirements
Navigate the world of work	1.1-1.4, 2.1-2.5, 3.1, 3.3, 3.5	• Recognises, understands and applies applicable legislation, industry standards and organisational policies and procedures in the conduct of own work
Interact with others	1.4, 2.5	• Selects and uses appropriate conventions and protocols when communicating with external stakeholders to supply required information
Get the work done	1.1-1.4, 2.1, 2.2, 2.5, 3.4	• Uses formal and logical processes to plan and complete tasks, achieving timelines and organisational requirements • Uses analytical skills to identify discrepancies, attempts to resolves the issues within the context of own responsibilities and, where appropriate, consults with more experienced colleagues for assistance • Uses a range of digital technologies to access, record, store, organise, compile, analyse and present complex data from multiple sources of information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIA402 Report on financial activity	BSBFIA402A Report on financial activity	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBFIA402 Report on financial activity

Modification History

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

Performance Evidence

Evidence of the ability to:

- organise and present financial data including budget variances, budgets and forecasts, cash flow/profit reports, balance sheets, financial year reports, operating statements, expenditure and receipts and profit and loss statements to highlight relevant features and meet workplace requirements
- use conversion and consolidation procedures such as moving averages, standardised variables, trend analysis and unit costs
- identify, resolve or refer discrepancies such as absence of auditable trail, expenditure report mismatches, incorrect payments and unreconciled cash flows
- record income and expenditure to meet statutory requirements
- calculate liabilities for tax including completing Business Activity Statements
- provide financial business recommendations
- apply knowledge of relevant legislation and regulations
- perform double entry bookkeeping and accrual accounting.

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 the key provisions of legislation, regulation and codes of practice relevant to financial operations
- describe the techniques used for forecasting and analysis
- identify the options, methods and practices for deductions, benefits and depreciations.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial administration field of work and include access to:

- office equipment and resources
- computer with relevant software
- examples of financial data, reports and documents
- workplace financial policies and 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

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BSBFIA501 Report on finances related to international business

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 report on finances related to international business activity.

It applies to individuals with managerial responsibility for compiling required financial information; identifying and meeting compliance requirements of relevant international, Australian and overseas finance regulations; and analysing the financial information to frame recommendations to improve compliance and effectiveness of international business activity.

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

Unit Sector

Business Development – International Business

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 Compile financial information	1.1 Identify financial information related to international business activity and separate it from domestic business activity for reporting and compliance purposes 1.2 Collect relevant current financial data, convert to currency used in report, and evaluate and code to ensure consistency, quality and accuracy in accordance with organisational requirements 1.3 Use conversion and consolidation procedures to compile

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ELEMENT	PERFORMANCE CRITERIA
	analysis in accordance with organisational requirements 1.4 Make, record and disclose asset and liability valuations, in accordance with organisational requirements 1.5 Identify, resolve or refer discrepancies, unusual features or queries to the appropriate authority
2 Ensure compliance with relevant international finance regulations	2.1 Identify financial compliance requirements associated with international business activity for relevant international finance regulations 2.2 Access processes to ensure compliance with financial compliance requirements of relevant international finance regulations, from workplace policies and procedures, and relevant information sources 2.3 Record income and expenditure to ensure compliance with statutory requirements 2.4 Calculate liabilities for tax in accordance with relevant legislation 2.5 Identify relevant receipts, revenue documentation and payments correctly 2.6 Ensure statements and claims take full advantage of available benefits and allowances in accordance with statutory requirements 2.7 Submit statutory requirement reports to appropriate authorities within stated deadlines
3 Provide financial business recommendations	3.1 Derive recommendations logically and support with evidence in report 3.2 Ensure recommendations propose constructive actions to enhance the effectiveness and efficacy of functions and services related to international business activity 3.3 Ensure recommendations are concise and facilitate direction and control of organisation's international operations 3.4 Identify and prioritise significant issues in statements, including comparative financial performances, for review and decision-making 3.5 Ensure structure and format of reports are clear and conform to organisational and statutory requirements

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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	1.1-1.5, 2.1-2.7, 3.1-3.5	• Identifies and interprets information from organisational policies, legislative and industry-related material
Writing	1.2-1.5, 2.3, 2.4, 3.1-3.5	• Produces evidence-based reports and records accurate data using relevant format, style and vocabulary suited to context and audience
Oral Communication	1.5, 3.2, 3.3	• Provides information concisely using appropriate terminology • Asks questions and listens to responses to clarify understanding
Numeracy	1.1-1.5, 2.1, 2.3- 2.7, 3.1, 3.4	• Uses a wide range of mathematical calculations to analyse and compare numeric information
Navigate the world of work	1.1-1.4, 2.1-2.7, 3.5	• Adheres to organisational, legal and regulatory requirements relevant to own work
Interact with others	1.5, 2.7	• Understands and uses communication protocols and practices that apply to particular circumstances
Get the work done	1.1-1.5, 2.1-2.4, 2.7, 3.1, 3.2, 3.4, 3.5	• Uses formal and logical processes to organise and gather complex information and complete tasks accurately and within timelines • Uses analytical skills to identify discrepancies and resolve 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

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBFIA501 Report on finances related to	BSBFIA501A Report on finances related to	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
international business	international business	Training Packages	

Links

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

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Assessment Requirements for BSBFIA501 Report on finances related to international business

Modification History

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

Performance Evidence

Evidence of the ability to:

- collate and analyse financial data for the international business operations of an organisation in compliance with Australian and international legislative requirements
- prepare financial reports containing recommendations and prioritising improvements in both compliance and the efficiency of the organisation's international business operations.

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 the organisational procedures and requirements relating to compliance issues and financial reporting
- explain the principles of accounting and financial systems
- describe the range of products or services being marketed and traded by the organisation internationally
- identify the key provisions of relevant legislation, regulations, codes of practice and national standards affecting international business operations
- list the sources of information to facilitate compliance with relevant international finance regulations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources

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- workplace documents including completed reports
- relevant information sources
- 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

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BSBFIM501 Manage budgets and financial 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 undertake financial management within a work team in an organisation. It includes planning and implementing financial management approaches, supporting team members whose role involves aspects of financial operations, monitoring and controlling finances and reviewing and evaluating effectiveness of financial management processes.

It applies to managers in a wide range of organisations and sectors who have responsibility for ensuring that work team financial resources are used effectively and are managed in line with financial objectives of the team and organisation.

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

Unit Sector

Finance - Financial Management

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 Plan financial management approaches	1.1 Access budget/financial plans for the work team 1.2 Clarify budget/financial plans with relevant personnel within the organisation to ensure that documented outcomes are achievable, accurate and comprehensible 1.3 Negotiate any changes required to be made to budget/financial

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ELEMENT	PERFORMANCE CRITERIA
	plans with relevant personnel within the organisation 1.4 Prepare contingency plans in the event that initial plans need to be varied
2 Implement financial management approaches	2.1 Disseminate relevant details of the agreed budget/financial plans to team members 2.2 Provide support to ensure that team members can competently perform required roles associated with the management of finances 2.3 Determine and access resources and systems to manage financial management processes within the work team
3 Monitor and control finances	3.1 Implement processes to monitor actual expenditure and to control costs across the work team 3.2 Monitor expenditure and costs on an agreed cyclical basis to identify cost variations and expenditure overruns 3.3 Implement, monitor and modify contingency plans as required to maintain financial objectives 3.4 Report on budget and expenditure in accordance with organisational protocols
4 Review and evaluate financial management processes	4.1 Collect and collate for analysis, data and information on the effectiveness of financial management processes within the work team 4.2 Analyse data and information on the effectiveness of financial management processes within the work team and identify, document and recommend any improvements to existing processes 4.3 Implement and monitor agreed improvements in line with financial objectives of the work team and the organisation

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, 3.1-3.4, 4.2, 4.3	• Interprets and analyses information to determine activities required

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Writing	1.1, 1.4, 4.1-4.3	• Records information in correct forms and prepares materials which convey detailed and factual content in accordance with internal procedures
Oral Communication	1.2, 1.3, 2.1-2.3	• Presents information about financial issues and requirements to a range of audiences using structure and language to suit the audience • Uses active listening and questioning to clarify information and to confirm understanding
Numeracy	1.1-1.3, 2.1-2.3, 3.1-3.4, 4.1-4.3	• Uses a wide range of mathematical calculations to analyse numeric information in budgets or financial plans
Navigate the world of work	2.2, 3.3, 3.4, 4.3	• Recognises, understands and adheres to organisational requirements in undertaking own work
Interact with others	1.2, 1.3, 2.1, 2.2, 3.1, 2.3, 4.2, 4.3	• Uses a range of strategies to connect, collaborate and cooperate with other work colleagues in activities requiring collective effort and diverse skills and knowledge
Get the work done	1.1, 1.4, 2.3, 3.1-3.4, 4.1-4.3	• Uses logical processes in planning, implementing and evaluating complex tasks and developing alternative strategies in achieving goals and timelines • Uses a range of digital technologies to access, filter, compile, integrate and logically present complex information from multiple sources

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIM501 Manage budgets and financial plans	BSBFIM501A Manage budgets and financial 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

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Assessment Requirements for BSBFIM501 Manage budgets and financial plans

Modification History

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

Performance Evidence

Evidence of the ability to:

- use financial skills to work with and interpret budgets, ageing summaries, cash flow, petty cash, Goods and Services Tax (GST), and profit and loss statements
- communicate with relevant people to clarify budget/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 the Australian Taxation Office (ATO) and for auditing purposes.

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 basic accounting principles
- identify and explain the relevant legislation and current requirements of the Australian Taxation Office, including the Goods and Services Tax (GST)
- explain the key requirements for financiall record keeping and auditing
- describe the principles and techniques involved in managing:
  - budgeting
  - cash flows
  - electronic spreadsheets

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- GST
- ledgers and financial statements
- profit and loss statements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial management field of work and include access to:

- resources and documentation used in the workplace
- workplace policies and procedures
- workplace budgets and financial plans
- business technology
- case studies and, where available, 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

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BSBFIM502 Manage payroll

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 monitor security procedures for managing organisational payroll services and to calculate and process salary payments, group taxation and related payments.

It 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

Finance – Financial Management

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 procedures for management of payroll	1.1 Establish procedures that ensure the confidentiality and security of payroll information 1.2 Ensure procedures guarantee substantiation of claims for allowances 1.3 Establish control measures to safeguard organisation's financial resources in accordance with legislative and

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ELEMENT	PERFORMANCE CRITERIA
	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 Use nominated industrial awards, contracts and government legislation to calculate gross pay and annual salaries 2.2 Calculate statutory and voluntary deductions using government 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 in accordance with organisational policy and procedures 3.2 Reconcile salaries, wages and deductions in accordance with organisational policy and procedures 3.3 Deal with salary, wage and related enquiries in accordance with organisational policy and procedures
4 Administer salary records	4.1 Process declaration forms for new and existing employees in accordance with 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 in accordance with relevant government legislation 4.4 Calculate and transcribe group tax amounts and make payments in accordance with taxation procedures 4.5 Prepare and reconcile employee group certificate amounts from salary 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	1.1-1.4, 2.1, 2.2,	• Identifies and interprets information from organisational policies, legislative and industry-related

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	3.1-3.3, 4.1-4.5	material
Writing	1.1, 1.3, 1.4, 2.3, 3.1, 3.3, 4.1, 4.3-4.5	• 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 terminology appropriate to present to relevant personnel
Oral Communication	2.3, 3.3	• Articulates information concisely using appropriate terminology, tone and style • Uses questioning and listening techniques to exchange and clarify information
Numeracy	2.1-2.3, 3.1- 3.3, 4.2-4.5	• Uses a wide range of mathematical calculations to analyse and compare numeric information • Makes calculations to ensure work is completed according to predetermined deadlines
Navigate the world of work	1.3, 1.4, 2.1-2.3, 3.1-3.3, 4.1, 4.3, 4.4	• Monitors adherence to legal and regulatory responsibilities and organisational policies and procedures
Interact with others	2.3, 3.3	• Recognises and applies the protocols governing what to communicate with who, and how, in a range of work contexts
Get the work done	1.1, 1.3, 1.4, 2.3, 3.3, 4.1-4.5	• Uses logical processes in planning, implementing and evaluating routine and non-routine tasks in achieving goals and timelines • 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 • Understands the importance of secure information and privacy in relation to own work and takes responsibility for identifying and managing risk factors

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIM502 Manage payroll	BSBFIM501A Manage payroll	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBFIM502 Manage payroll

Modification History

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

Performance Evidence

Evidence of the ability to:

- document steps undertaken to establish payroll system
- use data and calculations to reconcile salaries, wages and deductions in accordance with all legislative and organisational requirements
- create accurate payroll management 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:

- explain key provisions of relevant legislation, standards, regulations and codes of practice that may affect aspects of payroll operations
- outline organisational policies and procedures across the full range of tasks for the required payroll processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial management field of work and include access to:

- office equipment and resources
- workplace policies and procedures
- samples of financial data
- business technology
- payroll system
- case studies and, where available, real situations.

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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

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BSBFIM601 Manage 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 undertake budgeting, financial forecasting and reporting and to allocate and manage resources to achieve the required outputs for the business unit. It includes contributing to financial bids and estimates, allocating funds, managing budgets and reporting on financial activity.

It 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

Finance – Financial Management

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 Plan for financial management	1.1 Review and analyse previous financial data to establish areas which have generated a profit or loss 1.2 Undertake research to review reasons for previous profit and loss 1.3 Review business plan to establish critical dates and initiatives that will require or generate resources in the next financial cycle

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Analyse cash flow trends 1.5 Review statutory requirements for compliance and liabilities for tax 1.6 Review existing software and its suitability for financial management
2 Establish budgets and allocate funds	2.1 Use previous financial data to determine allocations for resources 2.2 Make informed estimates of new items for inclusion in budget 2.3 Prepare budgets in accordance with organisational requirements and statutory requirements
3 Implement budgets	3.1 Circulate budgets and ensure managers and supervisors are clear about budgets, reporting requirements and financial delegations 3.2 Manage risks by checking there are no opportunities for misappropriation of funds and that systems are in place to properly record all financial transactions 3.3 Review profit and loss statements, cash flows and ageing summaries 3.4 Revise budgets, as required, to deal with contingencies 3.5 Maintain audit trails to ensure accurate tracking and to identify discrepancies between agreed and actual allocations 3.6 Ensure compliance with due diligence
4 Report on finances	4.1 Ensure structure and format of reports are clear and conform to organisational and statutory requirements 4.2 Identify and prioritise significant issues in statements, including comparative financial performances for review and decision making 4.3 Prepare recommendations to ensure financial viability of the organisation 4.4 Evaluate the effectiveness of financial management processes

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

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	Criteria	
Reading	1.1-1.6, 2.1-2.3, 3.2-3.5, 4.1-4.4	• Interprets, analyses and evaluates complex information to determine and adhere to organisational or legislative requirements and to assist with financial decision making
Writing	1.1-1.6, 2.1- 2.3, 3.1-3.5, 4.1-4.3	• 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
Oral Communication	3.1	• Explains financial decisions and outcomes clearly and uses listening and questioning techniques to exchange information and obtain agreement
Numeracy	1.1-1.6, 2.1-2.3, 3.2-3.5, 4.1-4.2	• 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
Navigate the world of work	1.5, 2.3, 3.6, 4.1	• Recognises, understands and adheres to legislative and organisational requirements in undertaking own work
Interact with others	3.1	• Selects and uses appropriate conventions and protocols when communicating with supervisors and managers to share information or seek agreement
Get the work done	1.1-1.6, 2.1-2.3, 3.1-3.5, 4.1-4.4	• 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 • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBFIM601 Manage finances	BSBFIM601A Manage 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

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Assessment Requirements for BSBFIM601 Manage finances

Modification History

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

Performance Evidence

Evidence of the ability to:

- plan for financial management
- read and review profit and loss statements, cash flows and aging summaries
- prepare, implement and revise a budget which aligns with the business plan, is based on research and analysis of previous financial data and cash flow trends, and meets all compliance requirements
- contribute to financial bids and estimates
- establish a budget and allocate funds in accordance with statutory and organisational requirements
- communicate with other people including:
  - reporting on financial activity and making recommendations
  - identifying and prioritising significant issues
  - ensuring managers and supervisors are clear about budgets.
- analyse the 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 an audit trail and complying with due diligence.

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 the requirements for financial probity
- describe the principles of accounting and financial systems
- explain Australian, international and local legislation and conventions that are relevant to financial management in the organisation

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- outline the requirements of the Australian Tax Office, including Goods and Services Tax, Company Tax, Pay As You Go.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial management field of work and include access to:

- financial data
- relevant legislation and Australian Tax Office requirements
- examples of business plans, profit and loss statements, cash flows and aging summaries
- organisational financial policies and procedures
- financial management software.

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

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BSBFIM801 Manage financial resources

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 financial resources in a complex environment for a substantial business unit or organisation.

Leaders are typically required to forecast future financial resource needs, analyse current asset performance and capacity to a standard expected in a commercial environment, and to set business targets. There is a requirement to manage compliance mechanisms, to manage financial risk within agreed plans and mechanisms, and to monitor compliance with financial projections.

It applies to the management of financial resources relating to complex and diverse operations or projects and is an important aspect of work for managers or leaders.

It may relate equally to small-scale activities within a small to medium-sized organisation or a significant activity in a large organisation.

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

Unit Sector

Finance – Financial Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Forecast future financial resource needs	1.1 Establish and report on the capacity of existing financial systems 1.2 Forecast financial data and business system requirements 1.3 Analyse forecasted requirements 1.4 Prepare and plan budget forecasts according to organisational and statutory requirements 1.5 Prepare and present recommendations for budget expenditure or for modification of existing projections
2 Analyse current asset performance and capacity	2.1 Analyse the costs of, and returns from, assets and liabilities using standard accounting techniques to identify extent of debt and equity financing 2.2 Establish management responsibilities and legal requirements for reporting, in consultation with relevant organisational staff 2.3 Analyse and interpret financial reports and key information 2.4 Analyse and evaluate the effects of financial decisions on the ability of the organisation to meet planned outcomes
3 Set business targets and compliance mechanisms	3.1 Collect comparative and trend information and confirm needs for future budget and associated resources 3.2 Complete negotiations to secure resources in accordance with relevant short-term and long-term needs 3.3 Allocate resources against the budget to maximise organisation’s performance 3.4 Maintain accurate and up-to-date records of resource allocation and usage according to organisational and legislative requirements 3.5 Develop and review management systems which enable timely collection, management and processing of information 3.6 Complete and accurately report records of budget performance and expenditure according to organisational procedures and statutory requirements 3.7 Evaluate and improve budget audit mechanisms and compliance requirements as required
4 Manage financial risk	4.1 Identify and analyse financial risk factors 4.2 Document and manage financial risks according to organisational policies and procedures 4.3 Implement procedures to regularly review financial risk management activities

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ELEMENT	PERFORMANCE CRITERIA
5 Monitor compliance with financial projections	5.1 Identify deviations from budgets that generate an adverse effect on budget objectives 5.2 Promptly develop action plans to remedy significant deviations from budget objectives and projections 5.3 Monitor and review financial documentation against organisational objectives 5.4 Revise and renew budget priorities to meet operational contingencies and risk management 5.5 Manage costs to targets set in the budget

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, 2.3, 2.4, 3.1, 3.4-3.7, 4.1-4.3, 5.1-5.3	• Identifies, analyses and evaluates complex text from a variety of sources to determine business requirements
Writing	1.1, 1.2, 1.4, 1.5, 2.2, 3.1, 3.4-3.6, 4.2, 5.2-5.4	• 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 terminology appropriate to present to relevant personnel
Oral Communication	1.5, 2.2, 3.2	• Articulates information concisely using appropriate terminology, tone and style • Uses questioning and listening techniques to exchange and clarify information
Numeracy	1.1-1.5, 2.1, 2.3, 2.4, 3.1, 3.3, 3.4, 3.6, 3.7, 4.1, 5.1, 5.3, 5.5	• Collects, records, analyses and adjusts numerical data using appropriate methods
Navigate the world of work	1.4, 2.2, 3.4, 3.6, 5.3, 5.4	• Recognises, understands and applies applicable legislation, industry standards and organisational policies and procedures in the conduct of own work
Interact with others	1.5, 2.2, 3.2, 3.6	• Tailors communication to achieve its purpose, demonstrating an understanding of the needs, interests,

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		issues and priorities of each audience • Collaborates and negotiates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction
Get the work done	1.1-1.4, 2.1, 2.4, 3.1, 3.3, 3.5, 3.7, 4.1, 4.3, 5.1, 5.3, 5.4	• Uses logical processes in planning, implementing and evaluating complex tasks to achieve stated goals • Identifies problems, establishes the causes and applies analytical processes to formulate a course of action and criteria in addressing issues • Takes responsibility for high impact decisions in complex situations involving many variables and constraints • Defines benefits, costs, risks and feasibility from a broad range of perspectives and may think laterally to redesign aspects to address potential issues

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFIM801 Manage financial resources	BSBFIM701A Manage financial resources	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBFIM801 Manage financial resources

Modification History

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

Performance Evidence

Evidence of the ability to:

- prepare a comprehensive financial plan according to organisational and legislative requirements
- monitor and manage financial resources over a full planning-cycle including setting targets, managing risks and improving compliance mechanisms
- effectively communicate financial reports and operational execution
- revise forecast according to changes in budget deviations.

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 principles of accounting, financial statements and cash flow
- clarify best-practice communication processes and methods
- summarise compliance requirements, including relevant legislative responsibilities
- explain the cost of capital, capital structure and working capital
- identify finance and investment decisions
- describe the goal of financial resource management
- describe the principles of finance relevant to the organisation’s operations
- explain risk and return.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial management field of work and include access to:

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- office equipment and resources
- samples of workplace documentation, including contractual and procurement policies
- financial data and 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

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BSBFLM303 Contribute to effective workplace relationships

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 gather information and maintain effective relationships and networks, with particular regard to communication and representation.

This unit applies to individuals who use leadership skills including motivation, mentoring and coaching to develop efficient, effective and unified teams and facilitate communication between team members and management of the organisation.

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

Unit Sector

Management and Leadership – Frontline Management

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 Seek, receive and communicate information and ideas	1.1 Collect information associated with the achievement of work responsibilities from appropriate sources 1.2 Communicate ideas and information to diverse audiences in an appropriate and sensitive manner 1.3 Seek contributions from internal and external sources to develop and refine new ideas and approaches in accordance with organisational processes

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Facilitate consultation processes to allow employees to contribute to issues related to their work, and promptly communicate outcomes of consultation to the work team 1.5 Promptly deal with and resolve issues raised, or refer them to relevant personnel
2 Encourage trust and confidence	2.1 Treat people with integrity, respect and empathy 2.2 Encourage effective relationships within the framework of the organisation's social, ethical and business standards 2.3 Gain and maintain the trust and confidence of colleagues, customers and suppliers through competent performance 2.4 Adjust interpersonal styles and methods in relation to the organisation's social and cultural environment
3 Identify and use networks and relationships	3.1 Identify and utilise workplace networks to help build relationships 3.2 Identify and describe the value and benefits of networks and other work relationships for the team and the organisation
4 Contribute to positive outcomes	4.1 Identify difficulties and take action to rectify the situation within own level of responsibility according to organisational and legal requirements 4.2 Support colleagues in resolving work difficulties 4.3 Regularly review workplace outcomes and implement improvements in consultation with relevant personnel 4.4 Identify and resolve poor work performance within own level of responsibility and according to organisational policies 4.5 Deal constructively with conflict, within the organisation's established processes

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, 1.5, 4.3	• Comprehends textual information to determine regulatory requirements and adhere to job processes

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		and internal policies
Writing	1.1-1.5, 4.3, 4.4, 4.5	• 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	1.2-1.5, 2.1, 2.2, 2.4, 3.1, 4.2-4.5	• 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
Navigate the world of work	1.3, 2.1, 2.2, 2.4, 4.1, 4.4, 4.5	• 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
Interact with others	1.2, 1.3, 1.4, 1.5 2.1, 2.2, 2.3, 2.4 4.2, 4.3, 4.4, 4.5	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to build rapport, establish networks, seek or share information, • Adjusts personal communication style in response to a diverse range of individuals in the work context • Uses collaborative techniques to engage team members in consultations and negotiations • Implements strategies to respond appropriately to conflict and poor work performance
Get the work done	1.1, 1.3, 1.4,1.5, 2.3, 3.1, 3.2, 4.1, 4.2, 4.3, 4.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for effective outcomes • Uses formal analytical thinking techniques and broad ranging consultative processes to identify issues and implement a constructive approach to solutions and improvement opportunities • Uses familiar digital technologies and systems to access, present and communicate information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM303 Contribute to effective workplace	BSBFLM303C Contribute to effective workplace	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
relationships	relationships		

Links

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

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Assessment Requirements for BSBFLM303 Contribute to effective workplace relationships

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 and analyse information to achieve planned outcomes
- apply techniques for resolving problems and conflicts and dealing with poor performance within organisational and legislative requirements
- review and improve workplace outcomes in consultation with relevant personnel
- 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
- develop networks and build team relationships.

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 how work relationships and the cultural and social environment can support or hinder achieving planned outcomes
- explain techniques for developing positive work relationships and building trust and confidence in a team
- identify relevant legislation from all levels of government that affects business operation

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- describe a range of methods and techniques for communicating information and ideas to a range of stakeholders
- outline problems solving methods
- explain methods to resolve workplace conflict
- explain methods to manage poor work performance
- explain how to monitor, analyse and introduce ways to improve work relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant legislation and regulations
- relevant workplace documentation and resources
- 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

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BSBFLM305 Support operational plan

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 support for operational practices and procedures within the organisation's productivity and profitability plans. This includes contributing to the operational plan, assisting in recruiting employees and acquiring resources, and monitoring and adjusting operational performance.

It applies to individuals who use planning and analytical skills to achieve the measurable, stated objectives of the team and the organisation. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non-routine activities that require some discretion and judgement.

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

Unit Sector

Management and Leadership – Frontline Management

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 Contribute to implementation of operational plan	1.1 Collect and record details of resource requirements and report to relevant personnel 1.2 Ensure the operational plan contributes to the achievement of the organisation's performance and business plan 1.3 Identify key performance indicators to measure own and work

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ELEMENT	PERFORMANCE CRITERIA
	team's performance 1.4 Undertake contingency planning as required 1.5 Support the development and presentation of proposals for resource requirements as necessary
2 Assist in recruiting employees and acquiring resources	2.1 Assist with employee recruitment and/or induction as required, within the organisation's policies, practices and procedures 2.2 Acquire physical resources and services according to the organisation's policies, practices and procedures, and in consultation with relevant personnel
3 Support operations	3.1 Identify and utilise performance systems and processes to assess team progress in achieving plans and targets 3.2 Compare actual productivity and performance with identified short-term budgets, targets and performance results 3.3 Identify and report unsatisfactory performance to relevant personnel, to enable action to be taken to rectify situation 3.4 Provide coaching to support individuals and teams to use resources effectively, economically and safely 3.5 Support consultation processes for development and/or variation of the operational plan as required 3.6 Present recommendations for variation to operational plans to relevant personnel 3.7 Follow performance systems, procedures and recording processes in accordance with organisation requirements

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	3.4	• Contributes to ongoing organisational improvement by training others to uses resources appropriately
Reading	1.1-1.3, 2.1, 2.2, 3.1, 3.2, 3.7	• Interprets information from a range of familiar texts

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Writing	1.1, 1.4, 1.5, 3.3, 3.6	• Uses appropriate vocabulary and grammatical structures to achieve precise meaning in a range of documentation
Oral Communication	1.1, 2.1, 2.2, 3.3-3.6	• Articulates information concisely using appropriate terminology, tone and style • Uses questioning and listening techniques to exchange and clarify information
Numeracy	1.1, 1.2, 2.2, 3.2, 3.4	• Interprets and analyses numerical information to support resource acquisition and broader business plan
Navigate the world of work	2.1, 2.2, 3.7	• Adheres to organisational policies and procedures and understands and meets expectations associated with own role
Interact with others	1.5, 2.1, 3.4-3.6	• Selects and uses appropriate conventions and protocols when communicating with relevant personnel • Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1-1.4, 3.1, 3.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for effective outcomes • Makes routine decisions and implements standard procedures for routine tasks • Recognises and responds to predictable routine problems related to role in the immediate work context

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM305 Support operational plan	BSBFLM305C Support operational plan	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

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Assessment Requirements for BSBFLM305 Support operational plan

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:

- assist in planning resource acquisition and usage including human resources, risk management and contingency planning
- share information and support members of the work team to achieve plans and targets
- monitor, analyse and report individual and team performance against identified targets.

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 processes used to plan and acquire resources
- summarise organisational recruitment and induction processes
- explain the relationship between key performance indicators and achievement of the operational plan
- explain the role of contingency planning in supporting the operational plan
- identify systems and processes for monitoring and reporting performance
- identify alternative approaches to improving resource usage and eliminating resource inefficiencies and waste
- identify relevant legislation, regulations, standards or codes of practice that may affect the operational plan
- identify the organisational policies, practices and procedures relevant to implementation of the operational plan.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant legislation and regulations
- relevant workplace documentation and resources
- 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

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BSBFLM306 Provide workplace information and resourcing 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 support the information management system. It involves the identification, acquisition, initial analysis and use of appropriate workplace information.

It applies to individuals who use organisational and analytical skills to support business and resource planning processes. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non-routine activities that require some discretion and judgement.

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

Unit Sector

Management and Leadership – Frontline Management

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 Locate relevant information	1.1 Identify and locate information required by teams 1.2 Acquire and review information according to organisational procedures 1.3 Apply plans and procedures to obtain information which is not immediately available/accessible

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ELEMENT	PERFORMANCE CRITERIA
2 Collect and report information	2.1 Collect information relevant to the needs of teams in an adequate and timely manner 2.2 Ensure information acquired is in a format suitable for analysis, interpretation and dissemination 2.3 Use information to identify and report relevant trends and developments to relevant personnel, within the limits of own role
3 Use information systems	3.1 Effectively use management information systems to store and retrieve data 3.2 Use available technology to manage information effectively 3.3 Report recommendations for improving information system to designated persons and/or groups
4 Support preparation of business plan and/or budgets	4.1 Effectively utilise the contribution of the work team when preparing business plans and/or budgets to gain support for outcomes 4.2 Present and record information to support preparation of business plans and/or budgets in accordance with organisation's guidelines and requirements 4.3 Follow contingency plans when alternative action is required
5 Support preparation of resource proposals	5.1 Consult with colleagues to collect resource planning data as required 5.2 Report estimated resource needs and usage according to organisational requirements as necessary 5.3 Facilitate resourcing within limits 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1-2.3, 3.1, 4.2, 4.3, 5.2	• Interprets information from a range of familiar texts including organisational policies and procedures
Writing	2.2, 2.3, 3.1, 3.3,	• Uses appropriate vocabulary and formats to achieve precise meaning in a range of documentation

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	4.1, 4.2, 5.2	
Oral Communication	2.3, 3.3, 4.1, 5.1	• Provides information using terminology and style appropriate to context and audience • Uses questioning and listening techniques to exchange and clarify information
Numeracy	1.1, 1.2, 2.1-2.3, 4.1, 4.2, 5.1, 5.2	• Interprets and analyses numerical information to identify budgetary requirements
Navigate the world of work	1.2, 1.3, 4.2, 5.2	• Adheres to organisational protocols and procedures and understands the nature and purpose of own role and associated responsibilities
Interact with others	3.3, 5.1	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Seeks to cooperate with others to achieve results in immediate work context
Get the work done	1.1, 1.3, 2.1, 2.2, 3.1-3.3, 4.1, 4.3, 5.1, 5.3	• Takes responsibility for planning and organising tasks required to achieve required outcomes • Makes routine decisions based on implementation of standard plans and procedures • Collects and analyses information efficiently to develop recommendations for improvements and perform resourcing tasks • Uses digital systems and tools to access, store and retrieve data and manage information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM306 Provide workplace information and resourcing plans	BSBFLM306C Provide workplace information and resourcing 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

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Assessment Requirements for BSBFLM306 Provide workplace information and resourcing 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:

- use management information system to collect, store and retrieve data to support the preparation of business plans and/or budgets
- involve the work team in planning and budget preparation
- estimate resource needs and usage according to organisational requirements and allocating or acquiring resources within limits of own role.

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 information contained in management information systems
- discuss basic financial concepts relating to operational plans and budgets
- list the main requirements of a business plan
- outline data required to prepare resource proposals
- outline methods to gain efficiencies in operational resource management.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others
- business technology.

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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

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BSBFLM309 Support continuous improvement systems and processes

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 support the organisation's continuous improvement systems and processes. Particular emphasis is on actively encouraging the team to participate in the process, monitoring and reporting on specified outcomes and supporting opportunities for further improvements.

It applies to individuals with roles of responsibility who use initiative, organisational and communication skills to influence the ongoing development of the organisation.

At this level, work will normally be carried out within known routines, methods and procedures, and may also involve complex or non-routine activities that require some discretion and judgement.

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

Unit Sector

Management and Leadership – Frontline Management

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 Contribute to continuous improvement systems and processes	1.1 Actively encourage and support team members to participate in decision-making processes and to assume responsibility and exercise initiative

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Communicate the organisation's continuous improvement processes to individuals and teams 1.3 Effectively utilise mentoring and coaching to ensure that individuals/teams are able to support the organisation's continuous improvement processes
2 Monitor and report specified outcomes	2.1 Utilise the organisation's systems and technology to monitor team progress and to identify ways in which planning and operations could be improved 2.2 Apply continuous improvement techniques and processes to improve customer service
3 Support opportunities for further improvement	3.1 Communicate agreed recommendations for improvements in achieving the business plan to team members 3.2 Document and use work performance to identify opportunities for further improvement 3.3 Maintain records, reports and recommendations for improvement 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	Performance Criteria	Description
Learning	1.3	• Contributes to ongoing organisational improvement by mentoring others to support continuous improvement processes
Reading	2.1, 3.3	• Interprets everyday workplace documentation
Writing	1.2, 3.1-3.3	• Uses appropriate vocabulary and grammatical structures to achieve precise meaning in a range of documentation
Oral Communication	1.1-1.3, 3.1	• 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

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Navigate the world of work	1.2, 3.3	• Understands the nature and purpose of own role and associated responsibilities and how own role meshes with others and contributes to broader work goals • Takes responsibility for adherence to organisational processes and systems
Interact with others	1.2, 1.3	• Shares information and resources, offers assistance voluntarily and facilitates effective group interactions
Get the work done	2.1, 2.2, 3.2, 3.3	• Takes responsibility for routine low-impact decisions within familiar situations • Evaluates effectiveness of decisions in terms of how well they meet stated goals • Uses a range of digitally based technology and applications to organise, monitor, manage and communicate relevant information effectively

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM309 Support continuous improvement systems and processes	BSBFLM309C Support continuous improvement systems and processes	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

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Assessment Requirements for BSBFLM309 Support continuous improvement systems and processes

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:

- perform actions to support continuous improvement including:
  - using work performance to identify improvement
  - adjusting plans to reflect changes
  - communicating effectively with all stakeholders
  - using technology to monitor operational progress
  - applying suitable recordkeeping 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:

- explain principles and techniques relating to:
  - continuous improvement systems and processes
  - benchmarking
  - best practice
- describe the benefits of continuous improvement
- list quality approaches which the organisation may implement
- explain methods that can be used in continuous improvement
- outline barriers to continuous improvement
- explain recording, reporting and recommendation processes to facilitate continuous improvement applied within the organisation.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others
- business technology.

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

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BSBFLM311 Support a workplace learning 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 effectively encourage and support a learning environment. Particular emphasis is on participation in processes to facilitate and promote learning and to monitor and improve learning performance.

It applies to individuals who use initiative and well-developed planning and communication skills in their role. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve complex or non-routine activities that require some discretion and judgement.

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

Unit Sector

Management and Leadership – Frontline Management

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 Encourage a learning environment	1.1 Encourage and support workplace learning opportunities 1.2 Implement learning plans as an integral part of individual and team performance plans 1.3 Implement learning plans to reflect diversity of needs and learning opportunities 1.4 Encourage individual and team to access and participate in

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ELEMENT	PERFORMANCE CRITERIA
	learning opportunities 1.5 Liaise effectively with training and development specialists to contribute to learning opportunities which enhance individual, team and organisational performance
2 Encourage and promote learning for team and individuals	2.1 Promote a learning culture within the team and organisation 2.2 Support coaching and mentoring for the development of workplace knowledge, skills and attitudes 2.3 Encourage team members to assess own competencies, and to identify own learning and development needs 2.4 Share the benefits of learning with others in the team and organisation 2.5 Provide recognition and feedback for workplace achievement in a timely and appropriate manner
3 Identify opportunities for improvement	3.1 Monitor the performance of individuals and teams to determine the type and extent of required work-based support 3.2 Gather feedback from individuals and teams to identify opportunities for improving future learning arrangements 3.3 Negotiate adjustments with training and development specialists to improve the efficiency and effectiveness of learning 3.4 Document and report learning outcomes in accordance with the organisation's systems 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	Performance Criteria	Description
Learning	1.1, 1.2, 2.1, 3.2	• Plans and implements learning processes • Encourages learning outcomes in a team environment
Reading	1.2, 1.3, 3.2, 3.4	• Interprets information from a range of familiar texts including everyday workplace documentation
Writing	1.2, 1.3, 2.5, 3.4	• Uses appropriate vocabulary, grammatical structures and conventions to communicate information,

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		matching style to purpose and audience
Oral Communication	1.1, 1.4, 1.5, 2.1-2.5, 3.2-3.4	• Presents ideas and seeks feedback from others using appropriate vocabulary and non-verbal features • Participates in open discussions to elicit the views of others by asking questions and listening to responses
Navigate the world of work	3.4	• Adheres to organisational policies and procedures
Interact with others	1.1, 1.4, 1.5, 2.1-2.5, 3.2, 3.3	• Varies content and style of interactions to suit the needs of various audiences and to achieve a desired outcomes • Uses effective interpersonal skills to support and encourage workplace learning and sharing of knowledge and skills
Get the work done	1.2, 1.3, 2.5, 3.1, 3.2	• Takes personal responsibility for planning and organising tasks required to achieve required outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM311 Support a workplace learning environment	BSBFLM311C Support a workplace learning 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

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Assessment Requirements for BSBFLM311 Support a workplace learning 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:

- liaise with workplace personnel to develop, implement and support learning in the workplace
- identify learning needs, develop learning plans and arrange learning opportunities
- compile and interpret data about learning arrangements and outcomes in accordance with 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:

- summarise important considerations in an adult learning environment
- explain the differences and similarities between coaching and mentoring
- outline workplace learning principles and the organisational policies and procedures for applying learning systems.
- describe different types of learning opportunities that could be provided the workplace.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBFLM312 Contribute to team effectiveness

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 contribute to the effectiveness of the work team. It involves planning with the team to meet expected outcomes, developing team cohesion, participating in and facilitating the work team, and communicating with the management of the organisation.

It applies to individuals who play a prominent part in motivating, mentoring, coaching and developing team cohesion through team leadership and forming the link between the management of the organisation and the team members. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve complex or non-routine activities that require some discretion and judgement.

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

Unit Sector

Management and Leadership – Frontline Management

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 Contribute to team outcomes	1.1 Consult team members to identify team purpose, roles, responsibilities, goals, plans and objectives 1.2 Support team members to meet expected outcomes

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ELEMENT	PERFORMANCE CRITERIA
2 Support team cohesion	2.1 Encourage team members to participate in the planning, decision making and operational aspects of the work team to their level of responsibility 2.2 Encourage team members to take responsibility for their own work and to assist each other in undertaking required roles and responsibilities 2.3 Provide feedback to team members to encourage, value and reward team members' efforts and contributions 2.4 Identify and address issues, concerns and problems identified by team members, or refer to relevant persons as required
3 Participate in work team	3.1 Actively encourage and support team members to participate in team activities and communication processes and to take responsibility for their actions 3.2 Support the team to identify and resolve problems which impede its performance 3.3 Utilise own contribution to work team to serve as a role model for others and enhance the organisation's image within the work team, the organisation and with clients/customers
4 Communicate with management	4.1 Maintain open communication with line manager/management at all times 4.2 Communicate information from line manager/management to the team 4.3 Communicate unresolved issues to line manager/management and follow up to ensure action is taken in response to these matters

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
Writing	2.3, 2.4, 4.2, 4.3	• Uses appropriate vocabulary, grammatical structures and conventions to communicate information, matching style to purpose and audience
Oral	1.1, 1.2, 2.1-2.4, 3.1,	• Presents ideas and seeks feedback from others using vocabulary and non-verbal features appropriate to the

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Communication	3.2, 4.1-4.3	audience • Participates in open discussions to elicit the views of others by asking questions and listening to responses
Navigate the world of work	1.1	• Ensures that team members are aware of their rights and responsibilities in the workplace, including workplace safety
Interact with others	1.1, 1.2, 2.1-2.4, 3.1, 3.2, 4.1-4.3	• Collaborates, supports and cooperates with others to achieve work outcomes, and encourages others to do the same • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Recognises importance of own interpersonal skills in projecting a positive image to others in work context • Understands the need to modify own communication style to accommodate individual differences
Get the work done	1.1, 2.4, 4.1, 4.3	• Plans and implements tasks required to achieve required outcomes • Recognises and responds to problems related to role and seeks assistance when problems are beyond immediate responsibilities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM312 Contribute to team effectiveness	BSBFLM312C Contribute to team effectiveness	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

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Assessment Requirements for BSBFLM312 Contribute to team effectiveness

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:

- discuss and clarify goals and responsibilities with a team of people
- apply management and communication skills with a range of people that:
  - provides direction and leadership
  - assists individuals to achieve goals
  - motivates and builds team cohesion
  - fosters contribution of and respect for ideas
- apply techniques for resolving problems within organisational and legislative requirements
- communicate effectively with management including escalating problems outside own area of responsibility
- manage communication of information to, and between, the team.

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:

- list organisational goals, objectives and plans that relate to the team
- identify legislation, regulations, standards or codes of practice that may impact team performance and outcomes
- describe the organisational structure with reference to the organisational chart
- describe options for addressing performance issues in the organisation
- explain the principles and techniques of:
  - group dynamics and processes
  - motivation

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  - negotiation
- explain why considering individual behaviour and differences is important to a manager.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant workplace documentation and resources
- relevant legislation
- 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

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BSBFLM313 Apply language, literacy and numeracy to support others in the workplace

Modification History

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

Application

This unit describes the skills and knowledge required to demonstrate an understanding of language, literacy and numeracy (LLN) demands in the workplace and to provide support to other workers who need to develop LLN skills specific to their job role.

It applies to individuals who are not LLN specialists and have limited responsibilities over work colleagues and who provide assistance to those who may have LLN challenges, such as trainees and apprentices, culturally diverse workers, migrants, refugees and/or Aboriginal groups. This could include mentors, coordinators, managers or supervisors.

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

Unit Sector

Management and Leadership – Frontline Management

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. Demonstrate an understanding of language, literacy and numeracy	1.1 Identify the broad features of ‘language’, ‘literacy’ and ‘numeracy’ and the differences between them 1.2 Identify simple approaches for developing and practising LLN skills

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ELEMENT	PERFORMANCE CRITERIA
2. Identify the language, literacy and numeracy demands of the workplace	2.1 Identify the LLN requirements of simple everyday workplace tasks, documents and procedures that are explicit and non-explicit 2.2 Identify personal and cultural differences that can contribute to LLN challenges in the workplace 2.3 Identify benefits of LLN skill development in the workplace
3. Apply a range of skills that support workplace LLN	3.1 Encourage and support others to assess their own LLN competencies and ask for help with their learning and development needs 3.2 Identify behaviours that may indicate language, literacy and/or numeracy issues and discuss with appropriate personnel if necessary 3.3 Identify formal and informal community and workplace LLN specialist support that could be used to assist colleague with LLN skill development 3.4 Seek advice from appropriate personnel on strategies to support workers with LLN skill development needs 3.5 Use simple approaches for developing and practising LLN skills to assist workers with LLN skill development needs, in line with LLN specialist advice

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, 2.2, 2.3,	• Comprehends information from a range of sources, related to LLN • Interprets routine workplace documents to develop a clear understanding of LLN requirements
Oral Communication	3.1, 3.2, 3.4, 3.5	• Seeks and provides information using appropriate vocabulary and non-verbal features • Participates in open discussions to elicit the views and opinions of others • Obtains information by listening and questioning
Navigate the	2.1	• Identifies the LLN requirements in organisational procedures

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world of work		
Interact with others	2.2, 3.1, 3.4, 3.5	• Takes steps to vary content, structure, style, tone and vocabulary to suit the needs of others and to achieve a desired outcome • Collaborates with others to achieve results in immediate work context • Recognises own personal strengths and challenges when interacting with diverse people in work contexts • Seeks guidance to support those with specific needs in the workplace
Get the work done	1.1-1.3, 2.1-2.3, 3.2, 3.3	• Plans, organises and implements the tasks required to assist those with LLN needs • Uses problem solving strategies to determine needs and assist those who need LLN support

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM313 Apply language, literacy and numeracy to support others in the workplace	BSBFLM313A Apply language, literacy and numeracy to support others in the workplace	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

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Assessment Requirements for BSBFLM313 Apply language, literacy and numeracy to support others in the workplace

Modification History

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

Performance Evidence

Evidence of the ability to:

- analyse the language, literacy and numeracy (LLN) requirements of simple everyday workplace tasks and associated workplace documents
- identify behaviours that may indicate LLN difficulties in the workplace and discuss them with relevant personnel
- use simple approaches to help at least TWO individuals develop and practise their LLN skills in the workplace or a simulated work environment.

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 broad features of LLN, including the key principles of the Australian Core Skills Framework (ACSF), or its successor
- describe LLN demands of everyday workplace tasks, documents and procedures
- describe the benefits of LLN skill development in the workplace
- summarise sources of internal and external LLN specialist support and how to access them.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- 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

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BSBFLM314 Mentor others in the workplace to support their language, literacy and numeracy skill development

Modification History

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

Application

This unit describes the skills and knowledge required to mentor others who may have language, literacy or numeracy (LLN) challenges in the workplace that are affecting their performance. The mentoring relationship is not necessarily to improve LLN outcomes, but focuses on improving job performance taking into account LLN skills of individuals and teams.

It applies to individuals who are not LLN specialists and have limited responsibilities for work colleagues, who provide assistance to those who may have LLN challenges such as trainees and apprentices, culturally diverse workers including migrants, refugees and/or Aboriginal people. These roles include mentors, buddies, coordinators, managers or supervisors.

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

Unit Sector

Management and Leadership – Frontline Management

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 mentoring requirements and	1.1 Gather information about the skill development needs and individual characteristics of the person to be mentored

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ELEMENT	PERFORMANCE CRITERIA
arrangements	1.2 Liaise effectively with relevant personnel to determine the expected outcomes of the mentoring relationship 1.3 Establish mentoring arrangements and develop agreed expectations and goals in consultation with the worker to be mentored 1.4 Determine a mentoring plan in consultation with relevant personnel and worker to be mentored
2. Provide mentoring support	2.1 Apply strategies for developing effective relationships with culturally diverse workers 2.2 Share personal experiences and knowledge with worker to assist in progress to agreed goals and development 2.3 Provide a supportive environment by using techniques that support LLN in the workplace
3. Evaluate effectiveness of mentoring	3.1 Make adjustments to the relationship to take into account needs of both mentor and individual 3.2 Seek feedback from worker and other relevant personnel to identify and implement improvements

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, 3.2	• Organises, evaluates and interprets routine workplace documents to develop a clear understanding of job requirements
Writing	1.1, 1.3, 1.4, 3.2	• Documents planned mentoring approach using language and structure appropriate to audience and context
Oral communication	1.2-1.4, 3.2	• Presents ideas and seeks feedback from others using appropriate vocabulary and non-verbal features • Participates in open discussions to elicit the views of others by asking questions and listening to responses
Interact with others	1.2-1.4, 2.1-2.3, 3.1	• Uses a range of strategies to establish and build strong working relationships with others

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		• Takes steps to vary content, structure, style, tone and vocabulary to suit the needs of others and to achieve a desired outcome • Recognises how personal background can affect relationships with others • Shares information with others to achieve results in immediate work context • Seeks guidance to support those with specific needs in the workplace
Get the work done	1.1, 1.3, 1.4	• Gathers information, and plans, organises and implements the tasks required to assist those with LLN needs • Makes decisions about LLN needs in consultation with others • Uses evaluation and feedback from others to determine success of mentoring and decide whether improvements can be made

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFLM314 Mentor others in the workplace to support their language, literacy and numeracy skill development	BSBFLM314A Mentor others in the workplace to support their language, literacy and numeracy skill development	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

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Assessment Requirements for BSBFLM314 Mentor others in the workplace to support their language, literacy and numeracy skill development

Modification History

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

Performance Evidence

Evidence of the ability to:

- consult with at least TWO people to determine appropriate mentoring strategies and arrangements
- apply effective communication strategies to develop the mentoring relationship
- monitor and evaluate the mentoring program and determine the benefits of the program for the individual and 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 how to determine how language, literacy and numeracy (LLN) skills are affecting workers' capacity to perform effectively
- explain the goals of mentoring, and the roles of the mentor and the person being mentored
- outline communication techniques required to establish and support mentoring arrangements
- discuss key issues when negotiating expectations and goals for mentoring arrangements
- outline strategies for evaluating mentoring relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management field of work and include access to:

- case studies and, where possible, real situations

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- 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

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BSBFRA301 Work within a franchise

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 within a franchise to contribute to the successful operation of the business within a framework of compliance requirements.

It applies to staff who currently work, or are interested in working, in franchised businesses. These staff may be in a broad range of roles, such as retail, trade or hospitality.

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

Unit Sector

Management and Leadership – Franchising

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 Clarify requirements for working within a franchise	1.1 Determine role and responsibilities as an employee 1.2 Clarify role and responsibilities with supervisor, line manager and/or owner, as appropriate 1.3 Evaluate own skills to determine training needs to meet role and responsibilities 1.4 Seek assistance from supervisor/line manager/owner to evaluate training needs 1.5 Request and negotiate any reasonable adjustments to meet

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ELEMENT	PERFORMANCE CRITERIA
	these identified needs
2 Clarify own contribution to meeting compliance requirements	2.1 Consult with supervisor/line manager/owner to determine compliance requirements falling within own role and responsibilities 2.2 Determine work plan and ensure scheduled actions to meet compliance requirements are included in this plan 2.3 Undertake required audits, checks and associated tasks as per schedule 2.4 Seek advice as required to resolve difficulties arising in performing scheduled tasks 2.5 Accurately complete workplace records involved in meeting compliance requirements in a timely manner
3 Review own contribution to franchise operations	3.1 Seek feedback from others to confirm own role and responsibilities are being met 3.2 Review own work to ensure required tasks are undertaken as per schedules and work plans 3.3 Identify and discuss with supervisor/line manager/owner any improvements in own work practices and those of others within the franchise 3.4 Provide assistance when requested by others within the franchise to meet their assigned roles and responsibilities

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	1.3, 1.4	• Reviews own skills and seeks the opinions of others to determine training needs
Reading	1.1, 2.2, 2.3, 2.5, 3.2	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.5, 2.1-2.5, 3.1	• Prepares a range of texts using appropriate language and structure to communicate relevant information effectively

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Oral Communication	1.2, 1.4, 1.5, 2.1, 2.4, 3.1, 3.3, 3.4	• Uses listening skills to confirm understanding of requirements • Participates in verbal exchanges using appropriate tone and language
Numeracy	2.3	• Identifies and comprehends relevant mathematical information in familiar activities or texts
Navigate the world of work	1.1, 1.2, 2.1-2.3, 2.5	• May need guidance to identify the tasks and responsibilities associated with own role • Generally follows the compliance requirements immediately related to role
Interact with others	1.2, 1.4, 1.5, 2.1, 2.4, 3.1, 3.3, 3.4	• Seeks to cooperate with others to achieve results in immediate work context
Get the work done	1.1, 1.3, 2.2, 2.4, 2.5	• Takes responsibility for planning, sequencing and prioritising tasks to ensure they are completed within accepted timelines • Takes responsibility for routine low-impact decisions within familiar situations • Seeks assistance when problems are beyond immediate responsibilities or experience

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA301 Work within a franchise	BSBFRA301B Work within a franchise	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBFRA301 Work within a franchise

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:

- evaluate current skills to determine training needs to fulfil own role
- work closely with other people to create and implement a work plan to meet compliance requirements
- keep accurate records for compliance in accordance with role requirements
- assist others to meet their roles and responsibilities.

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 the methods used to check or audit work to ensure completion according to compliance requirements
- describe training opportunities that could enhance work practices
- outline auditing techniques to ensure work is being delivered according to a schedule
- describe the importance of teamwork in a franchise setting
- discuss the purpose of ongoing workplace reviews.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- relevant personnel.

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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

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BSBFRA401 Manage compliance with franchisee obligations and legislative requirements

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 comply with obligations set out in the franchising agreement and with relevant legislative requirements specific to the type of franchise.

It applies to individuals who require a broad knowledge of franchisee obligations and legislative requirements and who use this knowledge to develop compliance strategies.

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

Unit Sector

Management and Leadership – Franchising

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 Determine franchisee obligations and legislative requirements	1.1 Identify obligations under franchising agreement 1.2 Identify relevant legislative requirements 1.3 Access codes of practice and material that interprets and explains obligations and legislative requirements 1.4 Clarify obligations and legislative requirements with franchisor and relevant government and licensing agencies

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ELEMENT	PERFORMANCE CRITERIA
2 Develop strategies for compliance with franchisee obligations and legislative requirements	2.1 Analyse available information on obligations and legislative requirements to develop strategies for compliance 2.2 Check strategies with franchisor to determine suitability to operate franchise within obligations and legislative requirements 2.3 Use strategies to develop regular, cyclical compliance checks 2.4 Complete training to facilitate compliance requirements
3 Undertake scheduled compliance checks	3.1 Communicate compliance requirements to staff 3.2 Delegate compliance checks to relevant staff and provide training and support for staff to carry out these checks 3.3 Record timing and outcomes of compliance checks according to organisational requirements 3.4 Identify instances of non-compliance from compliance checks
4 Act on identified instances of non-compliance with franchisee obligations and legislative requirements	4.1 Determine courses of action to address instances of non-compliance 4.2 Seek assistance of franchisor or other relevant parties to address non-compliance 4.3 Take action to address non-compliance 4.4 Make checks to ensure non-compliance has been addressed 4.5 Monitor compliance in a specific area to ensure continuing compliance 4.6 Analyse reasons for non-compliance to guide future compliance

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	2.4	• Undertakes skill development in line with compliance requirements
Reading	1.1-1.4, 2.1-2.3, 3.3, 3.4, 4.4-4.6	• Recognises and interprets a variety of textual information to determine legislative and regulatory requirements, trends and outcomes

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Writing	1.4, 2.1, 3.1, 3.3, 3.4, 4.2, 4.3, 4.6	• Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and outcomes
Oral Communication	1.4, 2.2, 3.1, 3.2, 4.2	• Delivers factual information appropriate to audience and environment using appropriate language, tone and syntax • Uses active listening and questioning techniques to clarify and confirm understanding
Navigate the world of work	1.1-1.4, 2.1, 2.3, 2.4, 3.1, 3.3, 3.4, 4.1-4.6	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	1.4, 3.1, 3.2, 4.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Plays an active role in workgroup discussions, playing some attention to the perspectives of others
Get the work done	1.1, 1.2, 2.1, 2.3, 3.2, 4.1, 4.6	• Takes responsibility for planning, sequencing and delegating tasks for efficiency and effective outcomes • Selects from a range of predetermined options in routine situations, identifying and taking some situational factors into account • Reflects on outcomes and determines key concepts that could be adapted in future situations • Seeks input before implementing problem solving strategies

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA401 Manage compliance with franchisee obligations and legislative requirements	BSBFRA401B Manage compliance with franchisee obligations and legislative requirements	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBFRA401 Manage compliance with franchisee obligations and legislative requirements

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 compliance strategies in accordance with franchising agreement obligations and legislative requirements
- communicate compliance requirements to staff
- provide support to staff who will carry out compliance checks
- develop and implement schedule to carry out compliance checks
- record outcomes of compliance checks according to organisational requirements
- take action to address instances of non-compliance.

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

Knowledge Evidence

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

- identify work health and safety (WHS) requirements:
  - as specific to nature and type of franchise
  - as generic to all workplaces
- outline other relevant legislation, codes of practice and national standards that affect franchise operations
- explain franchise specific obligations:
  - as per franchise agreement
  - as per updates and amendments to agreement over time
- describe methods for carrying out compliance checks of franchise operations
- list penalties for non-compliance within the context for franchisee obligations and legislative requirements.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work and include access to:

- office equipment and resources
- relevant legislation and regulations
- examples of real franchise agreements and related 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBFRA402 Establish a franchise

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 a franchise from the initial research phase through to finalising a franchising agreement with the franchisor and opening the franchise for business.

It applies to potential franchisees who will operate under formal franchising agreements and focuses on the planning aspects of the establishment of a franchise.

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

Unit Sector

Management and Leadership – Franchising

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 Identify opportunities for establishing franchise	1.1 Research and identify franchising opportunities 1.2 Determine own interests and skills to assess suitability for identified opportunities 1.3 Determine requirements for establishing a specific franchise 1.4 Research and check viability and business record of franchisor in prospective franchise

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Enter into negotiations with a franchisor to establish a franchise
2 Complete business plan	2.1 Access business plan proforma, as appropriate 2.2 Consult franchisor and others in process of developing business planning documents 2.3 Research and determine financing options 2.4 Finalise financial planning for franchise 2.5 Undertake market analysis for franchise opportunity and complete marketing plan 2.6 Research and determine needs for premises in appropriate area 2.7 Compile relevant information into business plan
3 Identify and address learning needs	3.1 Determine required skills and knowledge to manage a franchise, and identify gaps for self and others 3.2 Seek assistance to assess and address learning needs and document these in the form of a learning plan 3.3 Determine training required by franchisor of a franchisee 3.4 Undertake learning plan and required training programs
4 Finalise agreements	4.1 Complete finance agreements 4.2 Access legal advice as required 4.3 Finalise and sign off franchising agreement 4.4 Obtain required permits for franchise operation 4.5 Finalise contracts and agreements with third parties
5 Prepare for opening of franchise	5.1 Obtain physical and human resources required to manage franchise 5.2 Undertake marketing activities associated with opening the franchise 5.3 Open the franchise for business

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

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	Criteria	
Learning	3.1, 3.2, 3.4	• Reviews own competencies and those of others to determine skill gaps and future training requirements
Reading	1.1, 1.4, 2.1-2.7, 3.1-3.4, 4.1-4.5, 5.1, 5.2	• Identifies and evaluates a variety of texts to determine business requirements
Writing	1.1, 1.4, 1.5, 2.3-2.7, 3.1-3.3, 4.1, 4.3, 4.5, 5.2	• Records results of analysis of information and consultations using clear and comprehensible language and layout • Prepares factual and informative content in documentation which meets requirements of purpose and audience
Oral Communication	1.5, 2.2, 3.2, 3.3, 4.2, 4.5	• Participates in verbal exchanges of information and elicits the view and opinions of others by listening and questioning • Articulates requirements clearly, based on language appropriate to audience and environment
Numeracy	2.4, 4.1	• Uses mathematical formula to calculate financial requirements and finalise official agreements
Navigate the world of work	1.4, 4.1-4.5	• Takes personal responsibility for establishing and adhering to legal/regulatory responsibilities relevant to own work context
Interact with others	1.5, 2.2, 3.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Seeks guidance and assistance to address learning needs
Get the work done	1.1-1.4, 2.1, 2.3-2.6, 3.1, 3.3, 5.1, 5.2, 5.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Takes responsibility for the outcomes of decisions related directly to own role

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA402 Establish a franchise	BSBFRA402B Establish a franchise	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBFRA402 Establish a franchise

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:

- determine own suitability for franchise
- complete a business plan
- identify and plan learning needs
- apply knowledge of relevant legislation, codes of practice and national standards.

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 legislation, regulations and codes of practice that effect franchise operations
- explain franchisee-specific obligations as per franchise agreement

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- office equipment and resources
- examples of real franchisee agreements and related documentation.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBFRA403 Manage relationship with franchisor

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 the franchisee to manage the business relationship with the franchisor.

It applies to individuals who need to develop good working relationships with their franchisor within the Franchising Code of Conduct.

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

Unit Sector

Management and Leadership – Franchising

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 relationship with franchisor	1.1 Identify the franchisor's representative/s or liaison person/s 1.2 Identify communication channels with the franchisor's representative/s or liaison person/s 1.3 Establish schedule of contact with the franchisor's representative/s or liaison person/s 1.4 Hold initial meeting with the franchisor's representative/s or liaison person/s to initiate ongoing relationship 1.5 Ensure participation in the franchisee advisory council meetings

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ELEMENT	PERFORMANCE CRITERIA
	and relevant activities
2 Determine services available from franchisor	2.1 Consult with the franchisor's representative/s or liaison person/s to determine range of services available through the franchisor 2.2 Establish schedule for accessing services of the franchisor 2.3 Access services available through the franchisor according to schedule and as needs arise in the course of business operations 2.4 Maintain currency of information relating to services available through the franchisor
3 Implement strategies for meeting franchisee's financial obligations	3.1 Identify franchisee's financial obligations to the franchisor 3.2 Develop and implement strategies and procedures to meet franchisee' financial obligations 3.3 Undertake planning to facilitate ongoing management of franchise
4 Resolve disputes with franchisor	4.1 Identify disputes with the franchisor and enter into negotiations with the franchisor's representative/s or liaison person/s in line with complaints handling procedure as described in the Franchising Code of Conduct 4.2 Seek assistance from third parties or mediators to facilitate resolution of disputes arising with the franchisor and in line with the complaints handling procedure 4.3 Resolve disputes and document courses of agreed action 4.4 Implement agreed courses of action to resolve disputes 4.5 Use lessons learned from disputes to guide future business operations and to facilitate positive relationships with the franchisor

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, 4.2	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and organisational requirements

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Writing	1.3, 2.2, 2.4, 3.2, 4.2, 4.3	• Uses clear, specific and industry-related terminology to complete and update workplace documentation to convey explicit information, requirements and recommendations
Oral Communication	1.3-1.5, 2.1, 2.4, 4.1-4.3, 4.5	• Articulates requirements clearly using language appropriate to audience and environment • Uses active listening and questioning techniques to clarify and confirm understanding
Numeracy	3.1	• Identifies and comprehends relevant mathematical information to manage financial obligations and account for expenditures
Navigate the world of work	2.3, 3.2, 4.1	• Recognises, develops and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2-1.5, 2.1, 4.1, 4.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Uses a range of strategies to establish a sense of connection with others • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	1.1-1.3, 2.2-2.4, 3.1- 3.3, 4.1, 4.3-4.5	• Plans, organises and implements tasks required to achieve required outcomes in accordance with franchise arrangement • Applies formal problem solving skills to address issues, seeking expert assistance if required • Identifies some key principles that may be relevant in future situations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA403 Manage relationship with franchisor	BSBFRA403B Manage relationship with franchisor	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBFRA403 Manage relationship with franchisor

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 regularly and effectively with the franchisor and/or representatives
- identify and resolve disputes
- conduct financial planning to meet predetermined requirements
- make suggestions for improvements in future work.
- implement processes to manage the relationship between franchisor and self.

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 franchise specific obligations as per franchise agreement, specifically financial obligations
- define the roles of others such as mediators/third parties
- explain various problem solving techniques that might be relevant to this specific context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- feedback from franchisor
- equipment and resources.

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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

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BSBFRA404 Manage a multiple-site franchise

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 multiple-site franchise.

A multiple-site franchise refers to an agreement between a franchisor and a franchisee for the operation of the franchise across more than one site or region.

It applies to franchisees operating under formal franchising agreements over multiple sites.

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

Unit Sector

Management and Leadership – Franchising

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 Plan for managing multiple-site franchise	1.1 Determine strategies for managing multiple-site franchise operations in consultation with the franchisor and within the franchisor's multiple-site policy 1.2 Document policies and procedures to support strategies for managing a multiple-site franchise 1.3 Determine and obtain physical resources to manage a multiple-site franchise 1.4 Determine and document practices to manage a multiple-site

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ELEMENT	PERFORMANCE CRITERIA
	franchise 1.5 Design duplicate management systems for each site of operation under a multiple-site operation
2 Appoint staff for multiple-site franchise	2.1 Select and recruit staff for a multiple-site franchise 2.2 Determine and communicate to all relevant parties, responsibilities and roles of supervisor or manager of site 2.3 Determine, document as an action plan, and implement learning needs of supervisors or managers
3 Implement plan for managing multiple-site franchise	3.1 Communicate and clarify policies, procedures and practices to manage a multiple-site franchise with supervisors or managers 3.2 Develop a monitoring plan for management of a multiple-site franchise 3.3 Delegate tasks to supervisors or managers and follow-up to ensure completion 3.4 Develop networks with other franchisees and multiple-site operators to inform best practice for multiple-site operation 3.5 Develop a review process for evaluating effectiveness and efficiency of management of a multiple-site franchise 3.6 Design and implement schedule of activities to manage a multiple-site franchise
4 Monitor multiple-site franchise	4.1 Monitor and implement plan for managing a multiple-site franchise 4.2 Seek feedback from franchisor on effectiveness and efficiency of management of a multiple-site franchise 4.3 Identify and act on required interventions from monitoring process 4.4 Provide feedback to managers or supervisors to guide efficient and effective management of franchise sites 4.5 Identify ongoing training needs for managers or supervisors and facilitate required training
5 Review management of multiple-site franchise	5.1 Implement review process for evaluating effectiveness and efficiency of management of a multiple-site franchise 5.2 Seek feedback and information from franchiser to inform review process 5.3 Identify improvements in management of sites from review process

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Identify, communicate and implement improvements to managers or supervisors 5.5 Monitor effectiveness of improvements

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	4.5	• Reviews competencies of managers and supervisors to determine skill gaps and future training needs
Reading	1.1-1.4, 2.1-2.3, 3.1, 5.1	• Critically organises, evaluates and analyses text within job specifications and work processes relating to managing multiple-site franchises and other related outcomes of the job
Writing	1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 3.1-3.6, 4.1, 4.2, 4.4, 5.1-5.5	• Communicates complex relationships between ideas and information, displaying good knowledge of structure and layout, employing a broad vocabulary and relevant grammatical structure
Oral Communication	1.1, 1.3, 1.4, 2.1-2.3, 3.1, 3.3, 4.2-4.5, 5.2, 5.4	• Participates in verbal exchanges using appropriate tone, language and syntax, and elicits the views and opinions of others by listening and questioning
Navigate the world of work	3.1	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.1, 2.1-2.3, 3.1, 3.3, 3.4, 4.2, 4.4, 5.2, 5.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Shares information, offers assistance voluntarily and provides feedback on others' work
Get the work done	1.1-1.5, 2.1-2.3, 3.1, 3.2, 3.4-3.6, 5.3, 5.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Uses analytical and lateral thinking to review current practices and develop new or improved processes and services • Uses the main features and functions of digital tools to complete work tasks and access information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBFRA404 Manage a multiple-site franchise	BSBFRA404B Manage a multiple-site franchise	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

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Assessment Requirements for BSBFRA404 Manage a multiple-site franchise

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:

- determine, implement and review a management strategy for all sites
- document and monitor plans for all sites
- document interventions for all sites.

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 work health and safety (WHS) requirements:
  - specific to nature and type of franchise
  - generic to all workplaces
- outline legislation, codes of practice and national standards relevant to franchising
- explain franchise specific obligations as per franchise agreement
- outline important points in managing a multiple site franchise.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- feedback from franchisor and managers or supervisors
- office equipment and resources.

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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

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BSBFRA501 Establish a franchise operation

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 a franchising operation from an existing business, chain of businesses or planned concept.

It applies to individuals with a well-established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to plan and establish a franchise operation.

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

Unit Sector

Management and Leadership – Franchising

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 Research feasibility of establishing a franchise operation	1.1 Undertake research into franchising models 1.2 Analyse existing business or planned concept to determine opportunity for expansion into franchise operation, seeking assistance as required 1.3 Undertake market research on product or service 1.4 Complete business plan for franchise operation 1.5 Complete marketing plan for franchise operation

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Determine financial viability of proposed franchise operation
2 Plan for establishment of a franchise operation	2.1 Secure financial backing for franchise operation 2.2 Complete documentation of franchising operation according to legislative and regulatory requirements 2.3 Define and document the roles and responsibilities of franchisor and franchisees 2.4 Develop and document policies and procedures for franchisees and franchisors 2.5 Determine and document resources required to commence franchise operation 2.6 Develop and document recruitment, support and monitoring processes for franchise operation
3 Implement plan for establishment of a franchise operation	3.1 Undertake marketing of franchise operation 3.2 Identify franchisees and formalise agreements 3.3 Assist franchisees in developing a business and marketing plan 3.4 Obtain resources to implement franchise operation 3.5 Support and coordinate franchise operation 3.6 Monitor franchise operation in accordance with agreement
4 Review implementation process	4.1 Develop and implement a process to review the start-up of a franchise operation 4.2 Evaluate practices used in start-up to identify improvements 4.3 Implement identified improvements to all documented policies, procedures and practices

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, 3.6, 4.2	• Identifies and analyses complex material from a range of sources and determines how content may be applied to business requirements

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Writing	1.4, 1.5, 2.2-2.6, 3.1, 3.2, 4.1, 4.3	• Develops material for a specific audience using clear and detailed language and appropriate structure to convey explicit information, requirements and recommendations
Oral Communication	2.1, 3.1-3.3	• Participates in verbal exchanges using appropriate tone, language and syntax and elicits the views and opinions of others by listening and questioning
Numeracy	1.2, 1.4, 1.6, 2.1, 2.5	• Interprets numerical information embedded in business materials to determine financial viability, secure funding to support operation and calculate necessary resources
Navigate the world of work	2.2, 2.4, 3.6, 4.3	• Identifies and adheres to legal and regulatory responsibilities • Creates and modifies organisational policies and procedures
Interact with others	1.2, 2.1, 3.3, 3.4	• Collaborates with others to achieve joint outcomes, influencing direction and taking a leadership role • Recognises the importance of taking audience, purpose and context into account when deciding what and how to communicate with others
Get the work done	1.1-1.6, 2.3, 2.5, 2.6, 3.1, 3.2, 3.4-3.6, 4.1, 4.2	• Uses formal, logical planning processes to identify relevant information, risks, alternative strategies and resources • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account • Uses experiences to reflect on key principles and concepts that may help with future improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA501 Establish a franchise operation	BSBFRA501B Establish a franchise operation	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBFRA501 Establish a franchise operation

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 initial research into franchise operations
- create a business and marketing plan to determine financial viability or secure financial backing
- create policies, procedures and processes in accordance with relevant legislative and regulatory requirements
- establish a formal agreement with a franchisee that specifies roles and responsibilities of both parties.

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 work health and safety (WHS) requirements specific to the nature and type of franchising operation
- outline legislation, codes of practice and national standards relevant to franchise operation
- explain what a financial feasibility study entails
- explain the differences between a marketing plan and business plan
- list and describe financing options available
- describe different franchising models, including how each operates.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

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- business documentation
- relevant legislation, regulations and codes of conduct
- feedback from franchisees
- 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

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BSBFRA502 Manage a franchise operation

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 franchise operation including establishing and implementing agreements and ensuring compliance with franchising obligations and legislative requirements.

The unit applies to individuals who manage an existing franchise operation and who support franchisees through the management of relationships, reporting and legislative requirements and operation effectiveness.

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

Unit Sector

Management and Leadership – Franchising

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 procedures for managing a franchise operation	1.1 Determine obligations of both parties under franchising agreement 1.2 Develop procedures for ensuring compliance with franchising obligations and legislative requirements 1.3 Develop and communicate reporting requirements of franchisees
2 Implement procedures	2.1 Implement procedures for franchises to ensure compliance with

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ELEMENT	PERFORMANCE CRITERIA
for managing a franchise operation	franchising obligations and legislative requirements 2.2 Identify instances of non-compliance and act upon them in conjunction with franchises 2.3 Monitor reports from franchises for completeness, accuracy and timeliness of submission 2.4 Identify potential disputes with franchises and take action to resolve potential disputes before they eventuate 2.5 Resolve disputes that eventuate and reach an agreed settlement within established procedures as documented in the Franchising Code of Conduct
3 Review a franchise operation	3.1 Use monitoring of franchises to inform review process for franchise operation 3.2 Identify improvements in franchise operation and management of franchises from monitoring franchises' business operations 3.3 Make recommendations to improve the effectiveness of the franchise operation and individual franchises

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, 2.3, 2.5	• Identifies, analyses and evaluates complex texts to determine legislative, regulatory and business requirements • Interprets reports to determine efficiency of franchise management
Writing	1.2, 1.3, 2.2 2.4, 2.5, 3.3	• Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.3, 2.2, 2.5	• Presents information using structure and language appropriate for the audience • Uses active listening and questioning to clarify and confirm understanding
Navigate the	1.1-1.3, 2.1, 2.5	• Understands obligations of own role and how it meshes with others to achieve broader organisational

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world of work		goals • Modifies or develops organisational procedures to comply with legislative and organisational requirements
Interact with others	1.3, 2.2, 2.4, 2.5, 3.3	• Identifies and uses appropriate conventions and protocols when communicating with a diverse range of people • Uses effective interpersonal skills to remedy issues and disagreements and negotiate acceptable outcomes
Get the work done	1.1, 1.2, 1.3, 2.1, 2.4, 2.5, 3.3	• Plans, organises and implements tasks required to achieve goals according to organisational and legislative requirements • Monitors actions against stated goals, adjusting plans and resources where necessary • Investigates new and innovative ways to improve work practices and processes through consultation, formal and analytical thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA502 Manage a franchise operation	BSBFRA502B Manage a franchise operation	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

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Assessment Requirements for BSBFRA502 Manage a franchise operation

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 implement franchising agreements
- complete documentation for a franchising agreement, including franchisee obligations and supporting documentation to ensure franchisee compliance with obligations
- develop and communicate reporting requirements
- monitor franchisee activities, obtain and analyse feedback and reports
- address non-compliances and resolve disputes to ensure franchisees meet franchising obligations
- review franchise operations and suggest improvements
- investigate and apply relevant legislation, codes of practice and national standards when developing and implementing procedures relating to franchising operations.

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 fundamentals of the Franchising Code of Conduct and other franchise specific obligations as per the franchise agreement and any updates and amendments to the agreement
- outline relevant legislation, codes of practice and national standards relating to franchising operations.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- relevant legislation, regulations and codes of conduct
- feedback from franchisees.

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

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BSBFRA503 Manage establishment of new sites or regions

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 the establishment of new sites or regions within an existing franchise operation and select new operators for existing franchises.

It applies to individuals with a well-established, sound theoretical knowledge base in franchising who identify opportunities for new sites or regions and assist potential franchisees in commencing operations.

The unit may also apply to the selection of new franchisees for existing sites or regions where a new operator is required to take over the franchise.

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

Unit Sector

Management and Leadership – Franchising

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 Identify opportunities for new franchise sites or regions	1.1 Access franchise organisation's strategic plan for expansion of franchise operation to determine opportunities for new sites or regions 1.2 Make analysis from closures of existing sites or regions and

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ELEMENT	PERFORMANCE CRITERIA
	other industry data to identify opportunities for new sites or regions 1.3 Undertake market research to identify opportunities for new sites or regions 1.4 Obtain agreement on new sites and regions from senior management 1.5 Confirm and document opportunities for new sites or regions within franchisor's policies
2 Select new franchisees	2.1 Supply applicants for new sites or regions with requirements for establishing a franchise 2.2 Check each applicant's suitability and ability to meet franchisor's requirements in consultation with applicants and franchise operation's management 2.3 Evaluate each applicant's business planning documents for suitability
3 Assist potential franchisees with establishing new franchise	3.1 Assist potential franchisees with completion of business and marketing plans 3.2 Clarify issues raised in relation to operation of the franchise with potential franchisees 3.3 Assist potential franchisees with obtaining required permits, site selection and financing options 3.4 Communicate and clarify with potential franchisees, marketing or other cooperative funds, intellectual property rights and rights to client database 3.5 Determine physical and human resources required for commencement of franchise in conjunction with potential franchisee
4 Formalise agreement with new franchisee/s	4.1 Make checks to ensure franchisee/s meet all requirements for entering into franchise agreement 4.2 Complete agreement with new franchisee/s and obtain necessary signatures 4.3 Determine date for commencement of franchise/s
5 Assist franchisee/s in opening new franchise	5.1 Assist franchisee/s obtain required physical and human resources to commence operations 5.2 Assist franchisee/s obtain required products to commence operations 5.3 Determine and implement responsibilities of franchisor as per

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ELEMENT	PERFORMANCE CRITERIA
	franchise agreement 5.4 Provide assistance to franchisee/s to determine and implement strategies and processes to meet franchisee obligations and legislative requirements as per franchise agreement and to manage the franchise 5.5 Monitor ability to commence franchise operations on due date in conjunction with franchisee/s 5.6 Determine training needs of franchisee/s and facilitate required training 5.7 Resolve problems arising in setting up franchise to commence business operations in conjunction with franchisee/s 5.8 Commence operations of new site or region within specified timeframes and within parameters set down by franchisor

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	5.6	• Reviews skills requirements of franchisees and expedites training as needed
Reading	1.1-1.3, 1.5, 2.2, 2.3, 3.1, 4.1, 4.2, 5.3, 5.4, 5.6	• Identifies and analyses complex material from a range of sources and determines how content may be applied to individuals and businesses
Writing	1.2, 1.3, 1.5, 3.1, 3.2, 3.4, 3.5, 4.2	• Develops material for specific audiences using clear and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.3-1.5, 2.1, 2.2, 3.1-3.5, 4.3, 5.1-5.4, 5.6, 5.7	• Participates in verbal exchanges using appropriate tone, language and syntax and elicits the views and opinions of others by listening and questioning
Numeracy	1.1-1.3, 2.3, 3.1, 3.3, 3.5, 4.3, 5.1, 5.8	• Evaluates mathematical information embedded in a range of texts to determine strategic planning • Uses mathematical formulas for scheduling work according to predetermined timeframes

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Navigate the world of work	1.1, 1.5, 3.4, 5.4	• Considers own role in terms of its contribution to broader goals of the work environment • Monitors adherence to legislative parameters, organisational policies and procedures
Interact with others	1.4, 2.1, 2.2, 3.1-3.4, 4.2, 5.1, 5.2, 5.4-5.7	• 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
Get the work done	1.1-1.5, 3.1, 3.2, 3.5, 5.1, 5.7	• Accepts responsibility for planning, prioritising and sequencing complex tasks and workload • Develops new and innovative ideas through exploration, analysis and critical thinking • Accepts responsibility for risk management, applying problem solving processes to determine solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA503 Manage establishment of new sites or regions	BSBFRA503B Manage establishment of new sites or regions	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

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Assessment Requirements for BSBFRA503 Manage establishment of new sites or regions

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 implement a plan for franchise expansion
- complete an agreement with franchisees
- provide advice and support to franchisees.

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 legislation, codes of practice and national standards relating to work health and safety (WHS), and other areas specific to the franchise operation
- explain the fundamentals of the Franchising Code of Conduct and other franchise specific obligations:
  - as per franchise agreement
  - as per updates and amendments to the agreement over time.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- relevant legislation, regulations and codes of conduct
- feedback from franchisees
- office equipment and resources.

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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

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BSBFRA504 Manage relationships with franchisees

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 relationships with franchisees.

It applies to individuals with a well-established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to establish, manage and maintain relationships with franchisees.

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

Unit Sector

Management and Leadership – Franchising

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 relationship with franchisees	1.1 Establish franchisee advisory council and other communication channels to link franchisee and franchisor to inform best practice and support franchisees and franchise operations 1.2 Determine and implement own role on franchisee advisory council 1.3 Determine and clarify own role and responsibilities as franchisor's representative 1.4 Establish schedule of contact with franchisees 1.5 Hold initial meetings with franchisees to initiate ongoing

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ELEMENT	PERFORMANCE CRITERIA
	relationships 1.6 Discuss and clarify roles and responsibilities of franchisor and franchisee with franchisees at initial meetings
2 Facilitate customer service provision to franchisees	2.1 Schedule and facilitate services to be provided to franchisees as per agreement 2.2 Negotiate and facilitate needs for additional services 2.3 Manage marketing or other cooperative funds according to documented agreements with franchisees 2.4 Resolve problems arising in service provision with franchisees in line with documented complaint handling procedures as specified in the Franchising Code of Conduct 2.5 Maintain currency of information relating to services provided through franchisor
3 Provide advice to franchisees	3.1 Monitor business activity of franchisees 3.2 Provide specific advice to franchisees through required training 3.3 Clarify requests for advice from franchisees and provide appropriate responses 3.4 Undertake research to inform advice to be provided 3.5 Provide timely, accurate advice in a manner that promotes acceptance of that advice 3.6 Ensure follow up with franchisee to ensure advice is understood and appropriate responses are made by franchisee
4 Review management of relationship with franchisees	4.1 Monitor relationships with franchisees for customer satisfaction 4.2 Review strategies and practices to manage relationship with franchisees to identify improvements 4.3 Implement identified improvements in managing relationships with franchisees

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

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	Criteria	
Reading	2.3-2.4, 3.1, 3.4, 4.1, 4.2	• Identifies and interprets information in agreements and relevant Codes of Conduct to confirm obligations and advice • Interprets feedback provided by franchisee
Writing	1.1-1.6, 2.1-2.3, 3.2-3.6, 4.1, 4.2	• Creates a range of texts to record schedules, meeting outcomes and reviews • Develops materials for a specific audience using clear and detailed language to convey information, advice, requirements and recommendations
Oral Communication	1.1, 1.5, 1.6, 2.4, 3.2, 3.3, 3.5, 3.6, 4.3	• Participates in a variety of spoken exchanges using language and non-verbal features appropriate to new franchisees • Uses listening and questioning skills to gather information and clarify understanding
Navigate the world of work	1.1-1.6, 2.1, 2.3, 2.4	• Identifies and establishes the responsibilities of own role and the roles of others • Takes full responsibility for following policies, procedures and the Franchising Code of Conduct
Interact with others	1.1-1.6, 2.1, 2.2,	• Establishes and uses appropriate communication channels and protocols • Uses effective interpersonal skills to remedy issues and disagreements and negotiate acceptable outcomes • Interacts effectively to build relationships and provide advice and information
Get the work done	1.1-1.6, 2.1, 2.2-2.5, 3.1-3.6, 4.1-4.3	• Accepts responsibility for planning, prioritising and sequencing complex tasks to achieve outcomes, according to agreements • Works independently and collectively in making decisions • Applies problem-solving skills to analyse and address issues with franchisees

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA504 Manage relationships with franchisees	BSBFRA504B Manage relationships with franchisees	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBFRA504 Manage relationships with franchisees

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:

- create and use strategies and processes to manage relationships with franchisees
- analyse franchisee needs
- provide accurate, relevant and timely advice according to agreements.

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 strategies and practices to manage relationships with franchisees
- outline the value of constantly improving relationships with franchisees
- explain the fundamentals of the Franchising Code of Conduct and other franchise specific obligations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- relevant legislation, regulations and codes of conduct
- feedback from franchisees
- office equipment and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBFRA505 Manage closure of a franchise

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 the closure of a franchise or to transfer it to a new franchisee, or to take action to prevent a closure being executed.

It applies to individuals with a well-established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to undertake the closure of a franchise or transfer to a new franchisee.

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

Unit Sector

Management and Leadership – Franchising

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 Investigate and implement alternatives to closure	1.1 Discuss, document and analyse reasons for closure with relevant stakeholders 1.2 Use lessons learned from previous franchise closures and potential franchise closures to arrive at alternative strategies 1.3 Research and negotiate alternative strategies to closure with franchisee and relevant third parties 1.4 Assess feasibility of transferring franchise to new franchisee

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Implement, where feasible, alternative arrangements to closure including transfer
2 Determine roles and responsibilities in closure or transfer of franchisee	2.1 Determine roles and responsibilities of all parties in closure or transfer in line with the Franchising Code of Conduct 2.2 Negotiate process for effecting closure or transfer with relevant stakeholders and document in the form of a plan 2.3 Allocate responsibilities for effecting closure or transfer 2.4 Negotiate closing date or transfer date for franchise with relevant stakeholders
3 Implement plan for closure or transfer	3.1 Communicate closing date or transfer date for franchise to relevant stakeholders 3.2 Carry out disposal of assets according to plan or transfer them to new franchisee 3.3 Facilitate financial settlements with financial institutions or franchisor's financial officers or debt collectors 3.4 Implement arrangements for closure or transfer in consultation with customers 3.5 Dispose of intellectual property including client database according to agreement between franchisor and franchisee 3.6 Undertake checks to ensure the process for closure or transfer has been completed according to plan
4 Review implications for franchise operations	4.1 Analyse implications for franchise operations from review of closure or transfer 4.2 Identify and recommend improvements to franchise operations and management of franchises

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, 3.2, 3.6, 4.1	• Evaluates and integrates facts and ideas to construct meaning from a range of texts

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Writing	1.1, 2.2, 2.3, 3.1, 3.4	• Develops material for specific audiences using clear and detailed language to convey explicit information, develop alternate strategies and document recommendations
Oral Communication	1.1, 1.3, 2.2, 2.4, 3.1, 3.4	• Participates in verbal exchanges using language and non-verbal features appropriate to the audience • Elicits the view and opinions of others by listening and questioning
Navigate the world of work	2.1, 3.5	• Determines and adheres to agreements and regulations
Interacts with others	1.1, 1.3, 2.2, 2.4, 3.1, 3.4	• Leads and facilitates discussions to achieve requirements • Uses effective negotiation skills to work with franchisees to implement closure • Selects and used appropriate modes and channels for communicating with diverse stakeholders
Get the work done	1.1-1.5, 2.1, 2.3, 3.1, 3.2, 3.3, 3.5, 3.6, 4.1, 4.2	• Accepts responsibility for planning, prioritising and sequencing complex tasks according to requirements • Uses analytical processes to evaluate and decide on closure options • Uses problem-solving processes to determine solutions to issues arising during closure

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBFRA505 Manage closure of a franchise	BSBFRA505B Manage closure of a franchise	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

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Assessment Requirements for BSBFRA505 Manage closure of a franchise

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:

- evaluate alternatives to closure
- plan franchise closure
- consult all stakeholders involved in closure
- document reasons for closure and incorporate these reasons into plans for future operations.

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 legislation, codes of practice and national standards relevant to the franchise operation
- explain the fundamentals of the Franchising Code of Conduct and other franchise specific obligations:
  - as per franchise agreement
  - as per updates and amendments to the agreement over time.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – franchising field of work. This includes access to:

- business documentation
- feedback from franchisees

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- 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

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BSBGOV401 Implement board member responsibilities

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 the diverse roles and responsibilities required of a board member.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources and who may provide leadership and guidance to others with some limited responsibility for the output of others.

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

Unit Sector

Regulation, Licensing and Risk – Governance

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 Identify business of the organisation	1.1. Ensure the history of the organisation is known and understood 1.2. List and explain the core functions of the organisation 1.3. Explain the relationship between the organisation, stakeholders and other organisations/entities
2 Monitor operations	2.1. Identify and document outcomes for each operational area 2.2. Use information provided to review effectiveness and

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ELEMENT	PERFORMANCE CRITERIA
	efficiency of operations 2.3. Suggest changes to operations if necessary
3 Follow legal requirements when carrying out board duties	3.1. List and describe relevant provisions of the legislation under which the organisation operates 3.2. Adhere to relevant aspects of Corporations Law 3.3. Adhere to the constitution of the organisation 3.4. List and comply with workplace responsibilities 3.5. Comply with the terms and conditions of funding agreements
4 Monitor trends and changes in community	4.1. Attend community meetings, speaking on behalf of the board as required and delegated 4.2. Maintain information and awareness of key stakeholders and political issues 4.3. Ensure the board is informed of identified community and stakeholder needs 4.4. Review policies with changing community needs, and incorporate into operations as required
5 Receive and act on community and stakeholder feedback	5.1. Receive and document feedback from the community and stakeholders about services 5.2. Evaluate feedback 5.3. Deal with feedback in accordance with policies and procedures, and in consultation with management 5.4. Document and support decisions of management

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, 3.1, 4.2, 4.4, 5.3	• Interprets textual information from relevant sources to identify compliance, political climate and stakeholder awareness
Writing	1.1-1.3, 2.1, 3.1, 3.4,	• Completes personal notes and formal workplace documentation using clear and technically specific

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	4.3, 5.1, 5.4	language for different audiences and purposes
Oral Communication	1.1-1.3, 2.1, 3.1, 3.4, 4.3, 5.1, 5.4	• Articulates information clearly using language and tone appropriate to audience and environment • Uses active listening and questioning techniques to receive feedback and confirm understanding
Navigate the world of work	2.3, 3.1-3.5, 4.2, 4.4, 5.3	• Ensures knowledge of legislative requirements and products is kept up-to-date in order to provide accurate information • Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements • Identifies issues that contravene relevant policies, procedures and legal requirements
Interact with others	4.1, 4.3, 5.1, 5.3	• Selects and uses appropriate conventions and protocols when communicating with various stakeholders and personnel in a range of work contexts • Cooperates with others and contributes to work practices where joint outcomes are expected
Get the work done	1.1, 2.1, 2.2, 5.2, 5.3	• Develops plans to manage relatively complex, non-routine tasks with an awareness of how they contribute to longer term operational and strategic goals • Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes for more complex and non-routine situations • Contributes to continuous improvement of current work practices by analysing and evaluating feedback

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBGOV401 Implement board member responsibilities	BSBGOV401A Implement board member responsibilities	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBGOV401 Implement board member responsibilities

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:

- consider relevant organisational and legislative parameters when making decisions affecting organisational and operational outcomes
- stay up to date with relevant political and community issues and communicate these clearly to the board
- respond to community and stakeholder opinions in consultation 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:

- outline the history of the organisation relevant to the community and location
- list and describe key provisions of relevant legislation, regulations, standards and codes of practice that affect business operations
- outline the organisational constitution, codes of conduct, functions, policies and procedures.

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 – governance field of work and include access to:

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

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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

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BSBGOV402 Work within organisational structure

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 be an active participant in the governance activities of a board, with an understanding of the roles and relationships to other roles on the board and within the organisation.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources and who may provide leadership and guidance to others with some limited responsibility for the output of others.

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

Unit Sector

Regulation, Licensing and Risk – Governance

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 Differentiate roles and responsibilities	1.1 Differentiate and document governance and management issues of the organisation in the organisation's governance policy guidelines 1.2 Identify, document and refer to the relationships between governance issues and management issues 1.3 Identify and document the roles of board members in the organisation's governance policies and procedures

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Explain the relationship between the board and associated entities, and their management 1.5 Outline the board's decision-making processes
2 Document management roles and responsibilities	2.1 Document performance outcomes, with appropriate assistance, and include in position description and contract 2.2 Clarify and document management duties, in consultation with management 2.3 Ensure areas of responsibility are discussed with board members who are also employed staff, and establish and document guidelines
3 Supervise management of the organisation	3.1 Receive information and advice from the manager and apply in decision making 3.2 Instruct the manager to implement policy decisions and to follow specific directions as required 3.3 Receive feedback from the manager about previous directions 3.4 Regularly review management performance in accordance with contract and position description

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, 3.3, 3.4	• Comprehends information from a range of sources to establish requirements and issues
Writing	1.1-1.3, 2.1-2.3	• Completes relevant reports and documentation using clear and technically specific language for different audiences and purposes
Oral Communication	1.4, 1.5, 2.2, 2.3, 3.1, 3.2	• Articulates information clearly and consults with others using language and tone appropriate to audience and environment • Uses active listening and questioning techniques to receive feedback and confirm understanding
Navigate the	1.1, 3.4	• Takes personal responsibility for following explicit and implicit organisational policy requirements

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world of work		• Understands how own role meshes with others and contributes to broader work goals
Interact with others	2.2, 2.3, 3.1-3.3	• Plays an active role in workgroup discussions, paying some attention to the perspectives of others • Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts
Get the work done	1.1, 2.3, 3.1, 3.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for effective outcomes • Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes for non-routine situations • Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBGOV402 Work within organisational structure	BSBGOV402A Work within organisational structure	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

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Assessment Requirements for BSBGOV402 Work within organisational structure

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:

- research and document differences between boards of governance and organisational management
- interpret policy decisions, communicate effectively and provide supervision to organisational management
- work with irregularities and breakdowns in communications between board members and/or organisational management
- work with irregularities and breakdowns in routine between board members and/or organisational 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:

- outline key provisions of relevant legislation, regulations, standards and codes of practice that affect business operations
- explain organisational constitution, codes of conduct functions, policies and procedures.

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 – governance field of work and include access to:

- participation on an actual or simulated board
- office equipment and resources

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- examples of relevant issues worked on by boards of governance, including community complaints, strategic decisions and internal staffing issues
- 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

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BSBGOV403 Analyse financial reports and budgets

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 analyse financial reports and budgets as a member of a board of governance of an organisation.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources and who may provide leadership and guidance to others with some limited responsibility for the output of others.

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

Unit Sector

Regulation, Licensing and Risk – Governance

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 Review financial reports and budgets	1.1 Obtain revenue/expenditure/requests/predictions from appropriate person 1.2 Consider and assess future organisational operations, with reference to all available plans 1.3 Consider previous financial statements to provide baseline information 1.4 Review budgets and cash flows using all available information

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ELEMENT	PERFORMANCE CRITERIA
2 Monitor revenue and expenditure against budget	2.1 Discuss and agree on appropriate monitoring and reporting systems, and establish procedures 2.2 Compare income and expenditure to budget and previous periods, and identify and investigate discrepancies 2.3 Identify and examine achievement and variances to the budget, in liaison with appropriate person 2.4 Document recommendations for action on variances 2.5 Request regular reports of operations to indicate fluctuations 2.6 Provide financial statements and accompanying report of operations to appropriate person for discussion
3 Finalise budget	3.1 Ensure expenditure commitments are brought into line with final income figures 3.2 Finalise, document and approve final budget in line with operational program 3.3 Present the final budget to appropriate person and stakeholders 3.4 Ensure reporting requirements of relevant corporate authority and funding bodies are 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	1.2, 1.3, 2.2, 3.4	• Interprets a range of textual information to monitor quality of operations and adherence to procedures and standards
Writing	2.1, 2.4	• Completes relevant reports and documentation using clear and technically specific language for different audiences and purposes
Oral Communication	1.1, 1.2, 2.1, 2.3, 2.5, 2.6, 3.3	• Articulates information clearly using language and tone appropriate to audience and environment • Uses active listening and questioning techniques to receive feedback and confirm understanding
Numeracy	1.3, 1.4, 2.2, 2.3,	• Analyses numerical information to compare revenue and expenditure against predetermined budgets and

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	2.6, 3.1, 3.2	available incomes
Navigate the world of work	2.1, 3.2, 3.4	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	1.1, 2.3, 2.5, 2.6, 3.3	• 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 interaction and taking a leadership role on occasion
Get the work done	1.3, 2.2	• Develops plans to manage relatively complex tasks with an awareness of how they contribute to longer term operational and strategic goals • Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes for more complex and non-routine situations • Recognises a range of problems and their symptoms, 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**
BSBGOV403 Analyse financial reports and budgets	BSBGOV403A Analyse financial reports and budgets	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

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Assessment Requirements for BSBGOV403 Analyse financial reports and budgets

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:

- monitor income and expenditure against designated budgets
- use appropriate systems to provide an accurate picture of organisation's operations
- check to ensure the budget considers existing and planned activities
- document recommendations to keep organisation within acceptable budgeting limits.

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 cultural context relevant to the community and location
- outline key provisions of relevant legislation, regulations, standards and codes of practice that affect business operations
- outline the organisational constitution, codes of conduct functions, policies and procedures.

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 – governance field of work and include access to participation on an actual or simulated board, access to office equipment and resources and examples of budgets, cash flows and other financial data and statements and examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBHRM403 Support performance management process

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 assist in the effective implementation of a performance management system and to facilitate employee performance.

It 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

Workforce Development – Human Resource Management

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 Review performance management infrastructure	1.1 Ensure all positions have current position descriptions specifying key requirements of the role 1.2 Assist in reviewing the performance management system to ensure it aligns with the strategic direction of the organisation 1.3 Ensure managers have provided reports of performance indicators consistent with the position description requirements 1.4 Check performance appraisal meetings are held in line with organisational timeframes, that correct documentation has been

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ELEMENT	PERFORMANCE CRITERIA
	completed, and necessary parties have recorded agreement 1.5 Check appropriate organisational procedures have been followed for acknowledging good performance and addressing under-performance 1.6 Provide advice and support where there is dissention about performance appraisal outcomes
2 Promote performance management system	2.1 Clarify goals and methods of the performance-management system to employees 2.2 Promote the performance management system to stakeholders 2.3 Arrange or deliver training or instruction on using the performance management system 2.4 Encourage ongoing and regular feedback on personnel performance as well as formal performance appraisals
3 Recommend improvements to performance management system in response to collated data	3.1 Review performance management documentation to establish 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 in revising policies and procedures where necessary 3.4 Suggest improvements to the performance management 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
Learning	2.3	• Actively reinforces learning by instructing and training others
Reading	1.1-1.3, 3.1-3.3	• Critically evaluates and applies content from a range of structurally complex texts to support performance management processes
Writing	1.1, 1.4, 2.1-2.4, 3.1, 3.3, 3.4	• Develops a range of documentation using tone, structure and language suited to context and audience
Oral	1.3, 1.6, 2.1-2.4, 3.4	• Asks questions and listens carefully to gather and evaluate information

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Communication		• Uses appropriate vocabulary and tone to present ideas, give advice and make suggestions
Numeracy	1.4	• Makes basic calculations to ensure work output meets predetermined timeframes
Navigate the world of work	1.2, 1.5, 3.3, 3.4	• Takes personal responsibility for adhering to and updating explicit and implicit organisational policies and procedures • Understands how own role meshes with others and contributes to broader work goals
Interact with others	1.3, 1.6, 2.1-2.4, 3.4	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts • Cooperates with others and contributes to work practices where joint outcomes are expected • Recognises behaviours and triggers that contribute to conflict and implements strategies to moderate conflict
Get the work done	1.1, 1.2, 1 4, 2.3, 3.2-3.4	• Takes responsibility for planning, sequencing and prioritising tasks required to achieve required outcomes • Addresses less predictable problems and initiates standard procedures in response, applying problem-solving processes in determining a solution • Contributes to continuous improvement of current work practices by analysing and evaluating outcomes of decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM403 Support performance management process	BSBHRM403A Support performance management process	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

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Assessment Requirements for BSBHRM403 Support performance management process

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:

- promote the implementation of the performance management system and analyse its strengths and weaknesses
- provide advice and information to employees on the benefits of effective performance management, and how it links with performance development
- review the performance management system
- make recommendations for improvement.

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 key elements and purposes of performance management processes, and their contribution to organisational objectives and the human resource cycle
- analyse the strengths and weaknesses of a performance management system
- outline rewards and incentives schemes
- identify warning systems and grievance procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- human resource policies, procedures and documentation relevant to performance management and feedback
- business technology

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- 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

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BSBHRM404 Review human resource functions

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 research that supports work across a range of human resource functional areas.

It 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

Workforce Development – Human Resource Management

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 Research human resources functions	1.1 Review business strategy and human resource strategy, clarify human resource issues for review, and document scope of review 1.2 Identify local, state or territory, national and international human resource networks for human resource professionals 1.3 Identify information sources for human resource data and information 1.4 Select a research strategy suitable to the topic and consult with

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ELEMENT	PERFORMANCE CRITERIA
	relevant personnel 1.5 Undertake research and review research findings
2 Review policy and procedures frameworks	2.1 Locate policies and procedures relevant to the organisation 2.2 Analyse strengths and weaknesses of policies and procedures 2.3 Consider legislation, regulations and standards that apply to the policies and procedures and the organisation 2.4 Identify sustainability issues that relate to human resource functions
3 Apply ethical framework	3.1 Review ethical requirements associated with the human resource function under review 3.2 Consider ethical obligations of human resource personnel working in the area under review 3.3 Document behaviours associated with working ethically in the area under review
4 Analyse human resource metrics	4.1 Select appropriate technology to gather workforce data and information to review human resource functions 4.2 Identify sources of workforce data 4.3 Collate and analyse data and establish key trends and critical information
5 Report research outcomes	5.1 Identify options for change suited to the organisation's culture, and any possible change barriers 5.2 Collate, analyse and document key findings of the review 5.3 Write report on outcomes of research 5.4 Develop recommendations for change

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	1.1-1.5, 2.1- 2.3, 3.1, 4.1, 4.3	• Critically evaluates and applies content from a range of structurally complex texts

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Writing	1.1, 3.3, 4.3, 5.2-5.4	• Develops a range of documentation using tone, structure and language suited to context and audience
Oral Communication	1.1, 1.4	• Asks questions to gather information and listens carefully to evaluate information • Uses appropriate vocabulary and tone in consultation process
Navigate the world of work	2.1-2.3, 3.1, 3.2	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	1.4	• Selects and uses appropriate conventions and protocols when communicating with relevant personnel • Forms connections with others who can contribute to effective work outcomes
Get the work done	1.2-1.5, 2.1, 2.2, 2.4, 3.1, 4.1, 4.2, 5.1	• 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 • Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking • 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**
BSBHRM404 Review human resource functions	BSBHRM404A Review human resources functions	Updated to meet Standards for Training Packages Minor change to unit title	Equivalent unit

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Links

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

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Assessment Requirements for BSBHRM404 Review human resource functions

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:

- prepare reports reviewing key human resource functions applying all ethical, organisational and legislative considerations
- use appropriate technology to collect and analyse workforce data.

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 the key provisions of legal and compliance requirements that apply to the organisation
- summarise relevant organisational policy and procedure frameworks
- summarise relevant ethical parameters
- explain how information technology can help analyse human resource metrics
- outline the roles and responsibilities of human resource practitioners.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- business and human resource strategies
- human resource policies and procedures, including ethical framework
- relevant legislation, regulations and codes of practice
- workforce data
- business technology

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- 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

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BSBHRM405 Support the recruitment, selection and induction of 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 execute tasks associated with the recruitment cycle and apply in-depth knowledge of the work of the organisation, and how recruitment and selection practices fit with other human resources functions.

This unit applies to individuals who support recruitment, selection and induction functions 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

Workforce Development – Human Resource Management

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 Plan for recruitment	1.1 Obtain approval to fill position, clarify time lines and requirement for appointment 1.2 Assist in preparing job descriptions that accurately reflect the role requirements, according to organisational policies and procedures, legislation, codes, national standards and work health and safety (WHS) considerations 1.3 Consult with relevant personnel about job descriptions and

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ELEMENT	PERFORMANCE CRITERIA
	workforce strategy 1.4 Assist in ensuring that job descriptions comply with legislative requirements and reflect the organisation's requirements for a diverse workforce 1.5 Obtain approvals to advertise position
2 Plan for selection	2.1 Choose appropriate channels and technology to advertise vacancies and/or identify potential talent pool 2.2 Advertise vacancies for staffing requirements according to organisational policies and procedures 2.3 Consult with relevant personnel to convene selection panel and develop interview questions 2.4 Assist in ensuring that interview questions comply with legislative requirements 2.5 Assist in short-listing applicants 2.6 Schedule interviews and advise relevant people of times, dates and venues
3 Support selection process	3.1 Participate in interview process and assess candidates against agreed selection criteria 3.2 Discuss assessment with other selection panel members 3.3 Correct biases and deviations from agreed procedures and negotiate for preferred candidate 3.4 Contact referees for referee reports 3.5 Prepare selection report and make recommendations to senior personnel for appointment 3.6 Advise unsuccessful candidates of outcomes and respond to any queries 3.7 Secure preferred candidate's agreement 3.8 Complete necessary documentation according to organisational procedures, observing confidentiality and privacy requirements
4 Induct successful candidate	4.1 Provide successful candidate with employment contract and other documentation 4.2 Advise manager and work team of new appointment 4.3 Advise managers and staff of candidate's starting date and make necessary administrative arrangements for pay and employee record keeping 4.4 Arrange successful candidate's induction according to

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ELEMENT	PERFORMANCE CRITERIA
	organisational policy

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, 2.4, 2.5	• Synthesises ideas, concepts and specific information from workplace and regulatory texts to inform development of workplace documents • Evaluates information to make judgements
Writing	1.1, 1.2, 1.5, 2.2, 3.5, 3.6, 3.8, 4.2, 4.3	• Produces a range of text types using specific information, workplace conventions and templates
Oral communication	1.1, 1.3, 1.5, 2.3, 2.5, 3.1-3.5. 3.7	• Asks questions and listens carefully to gather, interpret or evaluate information • Uses appropriate vocabulary to present ideas or persuasive arguments
Navigate the world of work	1.2, 1.4, 2.4, 3.3, 3.8, 4.1, 4.4	• Applies workplace protocols, legislation or regulations relevant to own responsibilities
Interact with others	1.3, 2.3, 3.2, 3.3	• Selects and uses appropriate conventions and protocols when communicating with personnel, candidates or referees • Participates in conversations relevant to role responding, explaining, negotiating and persuading as required
Get the work done	2.1, 2.3, 2.6, 4.1, 4.3, 4.4	• Selects and uses digital technology to access, enter, store and retrieve information in accordance with security requirements • Takes responsibility for planning and implementing tasks for efficient and effective outcomes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM405 Support the recruitment, selection and induction of staff	BSBHRM405A Support the recruitment, selection and induction of staff	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

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Assessment Requirements for BSBHRM405 Support the recruitment, selection and induction of 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:

- prepare job descriptions
- use job descriptions to support sourcing, selecting and appointing suitable staff
- use different advertising channels to promote vacancies and/or establish a potential talent pool
- consult with managers to gain approvals
- develop selection criteria and interview questions in consultation with relevant personnel
- schedule interviews and advise relevant people of times, dates and venues
- participate in interviews and other selection techniques including assessing candidates against selection criteria to short list them
- obtain referees' reports
- prepare and distribute a selection report including feedback to give unsuccessful candidates
- advise unsuccessful candidates of the results
- secure preferred candidate’s agreement and provide an employment contract
- advise other staff of the successful candidate and arrange induction.

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 documentation required for recruitment, selection and induction
- explain human resources life cycle and the place of recruitment and selection
- identify legislation relevant to recruitment, selection and induction of staff
- describe channels and technology to advertise vacancies

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- explain a range of interviewing techniques and other selection processes and their application.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- workplace policies and procedures
- business technology
- position descriptions
- legislation, regulations, Codes and Standards relevant to staff recruitment, selection and induction
- 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

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BSBHRM501 Manage human resource 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 plan, manage and evaluate delivery of human resource services, integrating business ethics.

It applies to individuals with responsibility for coordinating a range of human resource services 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

Workforce Development – Human Resource Management

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 Determine strategies for delivery of human resource services	1.1 Analyse business strategy and operational plans to determine human resource requirements 1.2 Review external business environment and likely impact on organisation's human resource requirements 1.3 Consult line and senior managers to identify human resource needs in their areas 1.4 Review organisation's requirements for diversity in the workforce

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Develop options for delivery of human resource services that comply with legislative requirements, organisational policies and business goals 1.6 Develop and agree on strategies and action plans for delivery of human resource services 1.7 Agree and document roles and responsibilities of human resource team, line managers, and external contractors
2 Manage the delivery of human resource services	2.1 Develop and communicate information about human resource strategies and services to internal and external stakeholders 2.2 Develop and negotiate service agreements between the human resource team, service providers and client groups 2.3 Document and communicate service specifications, performance standards and timeframes 2.4 Identify and arrange training support if required 2.5 Agree on, and arrange monitoring of quality assurance processes 2.6 Ensure that services are delivered by appropriate providers, according to service agreements and operational plans 2.7 Identify and rectify underperformance of human resource team or service providers 2.8 Identify appropriate return on investment of providing human resource services
3 Evaluate human resource service delivery	3.1 Establish systems for gathering and storing information needed to provide human resource services 3.2 Survey clients to determine level of satisfaction 3.3 Capture ongoing client feedback for the review processes 3.4 Analyse feedback and surveys and recommend changes to service delivery 3.5 Obtain approvals to variations in service delivery from appropriate managers 3.6 Support agreed change processes across the organisation
4 Manage integration of business ethics in human resource practices	4.1 Ensure personal behaviour is consistently ethical and reflects values of the organisation 4.2 Ensure code of conduct is observed across the organisation, and its expectations are incorporated in human resource policies and practices 4.3 Observe confidentiality requirements in dealing with all human

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ELEMENT	PERFORMANCE CRITERIA
	resource information 4.4 Deal promptly with unethical behaviour 4.5 Ensure all persons responsible for human resource functions understand requirements regarding their ethical behaviour

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, 1.4-1.6, 2.6, 2.8, 3.4, 4.2, 4.3	• Critically evaluates and applies content from a range of structurally complex texts
Writing	1.5, 1.7, 2.1-2.3, 3.1, 3.3	• Develops a range of documentation using tone, structure and language suited to context and audience
Oral Communication	1.3, 2.2, 3.2	• Asks questions to gather information and listens carefully to evaluate information • Uses appropriate vocabulary and tone in negotiations
Numeracy	2.3, 2.8	• Makes basic calculations to ensure work output meets predetermined timeframes • Selects from an expanding range of mathematical strategies when analysing investment policies
Navigate the world of work	1.1, 1.2, 1.4, 1.5, 2.6, 4.1, 4.2, 4.3	• Considers and adheres to organisational policies and procedures when developing plans and strategies • Monitors adherence to legislative and organisational requirements • Appreciates the implications of ethical, legal and regulatory responsibilities related to own work • Considers own role in terms of its contribution to broader goals of the work environment
Interact with others	2.1-2.3, 2.5, 2.7, 3.5, 4.4, 4.5	• Recognises the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate to whom, why and how • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction

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Get the work done	1.1, 1.2, 1.5, 1.6, 2.4, 2.6, 2.7, 3.1, 4.3	• Develops plans for complex, high-impact activities with organisational implications • Uses systematic, analytical processes to solve problems in complex, non-routine situations • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, and seeking input and advice from others • Uses digital technologies and systems safely, legally and ethically when gathering, storing and accessing information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM501 Manage human resource services	BSBHRM501B Manage human resources services	Updated to meet Standards for Training Packages Minor change to unit title	Equivalent unit

Links

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

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Assessment Requirements for BSBHRM501 Manage human resource 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:

- plan and manage human resource delivery within legislative, organisational and business ethics frameworks
- communicate effectively with a range of senior personnel
- identify and arrange training support where appropriate
- calculate human resource return on investment 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:

- identify the key provisions of legal and compliance requirements that apply to managing human resources
- summarise the organisation's code of conduct
- explain human resource strategies and planning processes and their relationship to business and operational plans
- describe performance and contract management
- explain how feedback is used to modify the delivery of human resources.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- business strategy and operation plans
- business technology

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- legislation, regulations and codes of practice relevant to staff recruitment, selection and induction
- 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

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BSBHRM502 Manage human resource management information 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 manage human resource information systems from the research and planning stages, through selection of appropriate systems, to implementation, ongoing review and system upgrades.

It applies to individuals with a well-established, sound theoretical knowledge base in human resource management and human resource information systems (HRIS) who are proficient in using a range of specialised technical and managerial techniques to plan, carry out and evaluate their own work and/or the work of a team. They may or may not have staff who report to them, but they are authorised to oversee the HRIS.

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

Unit Sector

Workforce Development – Human Resource Management

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 Identify human resource information requirements	1.1 Collect, collate and document information requirements of users 1.2 Identify communication processes to support user needs 1.3 Agree on information requirements and communication

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ELEMENT	PERFORMANCE CRITERIA
	processes with users and relevant managers 1.4 Develop a draft information systems management plan with agreed review mechanisms, timeframe and criteria 1.5 Specify information requirements in a clear and concise manner 1.6 Ensure information requirements are consistent with organisational objectives and policies 1.7 Identify resources required to meet the information requirements within budget parameters
2 Select human resource information management system	2.1 Agree on selection criteria for the information management system with relevant groups and individuals 2.2 Ensure that selection criteria for the system has the capability to meet organisation's objectives, policies and budget parameters 2.3 Evaluate potential systems against the criteria 2.4 Undertake cost benefit and risk analysis in relation to the systems which meet the selection criteria 2.5 Establish preferences for the system and provide selection report to senior managers 2.6 Ensure preferred system is capable of being customised to meet organisation and user requirements
3 Implement human resource information system	3.1 Develop implementation plan with users, other relevant groups and individuals 3.2 Confirm implementation plan's roles and responsibilities with individuals and groups involved 3.3 Assign resources to meet implementation plan timeframe, quality and other objectives 3.4 Modify implementation schedule to resolve any problems arising 3.5 Ensure groups and individuals contribute to implementation in accordance with plan objectives
4 Monitor and evaluate performance of human resource information system	4.1 Monitor information system performance and prepare performance reports 4.2 Obtain feedback from users about the system 4.3 Benchmark system performance and technical specifications against other systems, and latest trends and developments 4.4 Analyse performance gaps and current strategies and introduce

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ELEMENT	PERFORMANCE CRITERIA
	improvements

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, 1.6, 1.7, 2.2-2.4, 2.6, 3.3, 3.5, 4.1, 4.3, 4.4	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and organisational requirements
Writing	1.1, 1.3-1.5, 2.1, 2.5, 3.1, 3.3, 3.4, 4.1, 4.3, 4.4	• Demonstrates clear writing skills by selecting appropriate conventions and stylistic devices to express precise meaning relevant to context and audience
Oral Communication	1.3, 1.5, 2.1, 3.1, 3.2, 4.2	• Draws on a repertoire of open questioning and active listening to obtain feedback and confirm requirements • Uses appropriate terminology and non-verbal features to explain requirements
Numeracy	1.4, 1.7, 2.4	• Completes basic calculations to determine time taken to complete work within predetermined timelines • Prepares basic estimates, cost benefit and risk analyses according to pre-existing budgets
Navigate the world of work	1.6, 2.2, 2.6	• Adheres to all relevant organisational policies and procedures, and considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.3, 2.1, 3.2, 3.5	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	1.1, 1.4, 1.7, 2.3, 2.5, 2.6, 3.3, 3.4, 4.1, 4.3, 4.4	• Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others • Monitors progress of plans and schedules, and reviews and changes them to meet new demands and priorities • Applies systematic and analytical decision-making processes for complex and non-routine situations • Uses evaluation and analysis as a means to continuously improve work practices and processes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM502 Manage human resource management information systems	BSBHRM502A Manage human resources management information systems	Updated to meet Standards for Training Packages Minor change to unit title	Equivalent unit

Links

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

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Assessment Requirements for BSBHRM502 Manage human resource management information 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:

- assess written reports on human resource management information systems (HRIS)
- develop and implement a plan for a new HRIS in close consultation with others
- review the new system and make improvements where 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:

- describe monitoring, measuring and evaluation techniques for a range of human resource management functions
- outline procurement procedures, including preparation of a technical brief
- list the various types of HRIS available and their respective capabilities and limitations
- summarise key organisational protocols and processes applicable to managing a HRIS.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- documentation and resources normally used in the workplace
- case studies and, where possible, real situations
- workplace policies and procedures
- relevant legislation, regulations and codes of practice.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBHRM505 Manage remuneration and employee benefits

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 an organisation's remuneration and benefit 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.

It applies to individuals who are human resource managers 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

Workforce Development – Human Resource Management

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 Develop organisation's remuneration strategy	1.1 Analyse strategic and operational plans to determine the scope of remuneration and benefits plans 1.2 Undertake research on current practice, recent developments and legislative parameters for remuneration strategy 1.3 Develop options for consideration by relevant managers 1.4 Present options showing the link to organisational strategic

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ELEMENT	PERFORMANCE CRITERIA
	objectives 1.5 Ensure remuneration policies and incentive plans are agreed and recorded 1.6 Ensure organisation is positioned as an employer of choice and regarded as a desirable workplace
2 Implement remuneration strategy	2.1 Research occupational groups to determine those which are industrial agreement based 2.2 Access or undertake market rates surveys regularly to ensure the organisation's required level of competitiveness for particular occupational groups is maintained 2.3 Align remuneration and benefits plans with performance management system 2.4 Ensure employees receive at least their minimum entitlements according to organisational policies and legal requirements 2.5 Ensure salary packages comply with organisational policies and legal requirements, including fringe benefits tax (FBT) and superannuation 2.6 Ensure incentive arrangements, if included, comply with the organisation's remuneration strategy
3 Review and update remuneration strategy	3.1 Consult managers and employees about the effectiveness of the remuneration strategy 3.2 Amend strategy and plans as necessary to meet organisational policies and legal requirements

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, 2.1-2.3, 2.5, 2.6, 3.2	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.2, 1.3, 1.5, 2.2, 2.3. 3.2	• Develops complex material for specific audiences using clear language and appropriate structure to convey explicit information, requirements and

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		recommendations
Oral Communication	1.4, 1.5, 3.1	• 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	1.1, 2.3, 2.4, 2.6,	• Analyses numerical information to determine employee remuneration and benefits according to a clear set of parameters
Navigate the world of work	1.2, 1.4, 1.6, 2.3-2.6, 3.2	• Adheres to relevant organisational policies, procedures and legislative requirements • Considers own role in terms of its contributions to broader goals of the work environment
Interact with others	1.4, 1.5, 3.1	• Uses effective presentation and collaboration skills to show options, negotiate agreement and gain feedback on policies
Get the work done	1.1, 1.3, 2.2, 2.3, 3.2	• 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 models of remuneration and benefits for particular occupational groups and individuals • Uses evaluation and analysis of feedback to decide on improvements to strategy

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM505 Manage remuneration and employee benefits	BSBHRM505A Manage remuneration and employee benefits	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

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Assessment Requirements for BSBHRM505 Manage remuneration and employee benefits

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 remuneration strategies for different occupational groups
- manage remuneration and benefits in accordance with 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, FBT and bonus payments.

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 remuneration principles or models and approaches
- explain the ethical practices relating to remuneration and benefits strategies
- outline various remuneration or employee benefits
- describe ways to position an organisation an 'employer of choice'
- outline award structures for industrial agreements
- summarise organisational policies and procedures affecting remuneration strategies
- identify relevant legislation, regulations and standards that may affect remuneration strategies
- list the requirements of the Australian Taxation Office in relation to:
  - income tax
  - superannuation reporting
  - FBT and bonus payments.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- an appropriate range of documentation and resources normally used in the workplace
- organisational policies and procedures
- relevant legislation, regulations and codes of practice
- business technology.

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

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BSBHRM506 Manage recruitment selection and induction processes

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 all aspects of recruitment selection and induction processes in accordance with organisational policies and procedures.

It applies to individuals or human resource personnel who take responsibility for managing aspects of selecting new staff and orientating those staff in their new positions. It is not assumed that the individual will be directly involved in the selection processes themselves, although this may well be the case.

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

Unit Sector

Workforce Development – Human Resource Management

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 Develop recruitment, selection and induction policies and procedures	1.1 Analyse strategic and operational plans and policies to identify relevant policies and objectives 1.2 Develop recruitment, selection and induction policies and procedures and supporting documents 1.3 Review options for technology to improve efficiency and effectiveness of recruitment and selection process

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Obtain support for policies and procedures from senior managers 1.5 Trial forms and documents supporting policies and procedures and make necessary adjustments 1.6 Communicate policies and procedures to relevant staff and provide training if required
2 Recruit and select staff	2.1 Determine future human resource needs in collaboration with relevant managers and sections 2.2 Ensure current position descriptors and person specifications for vacancies are used by managers and others involved in recruitment, selection and induction processes 2.3 Provide access to training and other forms of support to all persons involved in recruitment and selection process 2.4 Ensure advertising of vacant positions complies with organisational policy and legal requirements 2.5 Utilise specialists where necessary 2.6 Ensure selection procedures are in accordance with organisational policy and legal requirements 2.7 Ensure processes for advising applicants of selection outcome are followed 2.8 Ensure job offers and contracts of employment are executed promptly, and new appointments are provided with advice about salary, terms and conditions
3 Manage staff induction	3.1 Provide access to training and ongoing support for all persons engaged in staff induction 3.2 Check induction processes are followed across the organisation 3.3 Oversee management of probationary employees and provide them with feedback until their employment is confirmed or terminated 3.4 Obtain feedback from participants and relevant managers on extent induction process is meeting its objectives 3.5 Make refinements to induction policies and procedures

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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, 2.6, 2.7	• Critically evaluates and applies content from a range of complex texts to determine legislative and business requirements
Writing	1.2-1.6, 2.1, 3.3-3.5	• Demonstrates clear writing skills by selecting appropriate conventions and to express precise meaning relevant to context and audience
Oral Communication	1.4, 1.6, 2.1, 2.3, 3.3, 3.4	• 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	2.8	• Analyses numerical information to determine employees' remuneration packages • Makes basic calculations to ensure work output is delivered in a timely manner
Navigate the world of work	1.1, 1.2, 1.5, 1.6, 2.4, 2.6	• Understands and adheres to relevant organisational policies and procedures • Develops or updates organisational policies to meet organisational objectives • Considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.4, 1.6, 2.1-2.3, 2.5, 2.7, 2.8, 3.1, 3.3, 3.4	• Seeks expert advice and skills training where required • Selects appropriate mode of communication for a specific purpose relevant to own role • Uses effective communication skills to liaise with a range of people across the organisation
Get the work done	1.1-1.3, 1.5, 1.6, 2.1, 2.3, 2.7, 2.8, 3.1, 3.2, 3.3	• Plans and implements tasks required to deliver timely outcomes, negotiating some key aspects with others • Monitors implementation of plans and adjusts as necessary • Considers whether and how often others should be involved, using consultative or collaborative processes as an integral part of the decision-making process • Analyses outcomes of decisions to identify improvement opportunities • Actively identifies systems, devices and applications with potential to meet current and future needs

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM506 Manage recruitment selection and induction processes	BSBHRM506A Manage recruitment selection and induction processes	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

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Assessment Requirements for BSBHRM506 Manage recruitment selection and induction processes

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 or critically analyse a policy and procedures framework for recruitment, selection and induction
- identify the need for recruitment
- prepare and oversee appropriate documentation required for recruitment
- select and advise job applicants appropriately
- manage the induction process
- comply with relevant legislation 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:

- describe recruitment and selection methods, including assessment centres
- explain the concept of outsourcing
- describe the purpose of employee contracts and industrial relations
- summarise relevant legislation, regulations, standards and codes of practice that may affect recruitment, selection and induction
- explain why terms and conditions of employment are an important aspect of recruitment
- explain the relevance of psychometric and skills testing programs to recruitment.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

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- an appropriate range of documentation and resources normally used in the workplace
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice
- business technology.

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

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BSBHRM507 Manage separation or termination

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 deal with redeployment, resignation, retirement, dismissal and redundancy, including the conduct of exit interviews.

It 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

Workforce Development – Human Resource Management

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 Develop policies and procedures for separation/termination of employment	1.1 Undertake research to determine features of best practice systems of separation/termination and the legal requirements 1.2 Undertake consultation with relevant managers prior to introduction of new forms, procedures or systems 1.3 Develop policies, procedures and supporting documentation for all forms of separation/termination 1.4 Ensure procedures for dismissal or termination respect employees, provide strict confidentiality and comply with

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ELEMENT	PERFORMANCE CRITERIA
	legislation 1.5 Obtain support for separation/termination policies and procedures from senior managers 1.6 Communicate policies and procedures, and provide supporting documents to relevant personnel 1.7 Use feedback to make refinements to policies, procedures and supporting documents for separation and termination
2 Manage separation/termination processes	2.1 Develop a redundancy or redeployment plan 2.2 Manage redundancies and redeployment and provide relevant information about processes so work outcomes are not compromised 2.3 Provide outplacement or other assistance in accordance with organisational policies and legal requirements 2.4 Ensure dismissals for incapacity to perform or misconduct comply with legislative and organisational requirements 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/termination procedures regularly and introduce improvements
3 Manage exit interview process	3.1 Ensure separating employees are offered opportunity to participate in exit interviews 3.2 Ensure process for exit interviews is clear and that staff are skilled to conduct them 3.3 Ensure data from exit interviews is recorded and depersonalised 3.4 Analyse data from exit interviews to establish trends and patterns and introduce improvements across the organisation

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

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	Criteria	
Learning	2.5, 3.2	• Ensures staff have necessary skills and training to oversee employees terminations
Reading	1.1, 1.3, 1.4, 1.7, 2.1, 2.2, 2.3, 2.6, 2.7, 3.2	• Critically evaluates and applies content from a range of texts to determine legislative and business requirements
Writing	1.1, 1.3, 1.6, 1.7, 2.1, 2.2, 2.6, 2.7, 3.3	• Records results of research for personal use • Uses a range of writing skills and techniques to create or edit organisational documentation in required format for a range of audiences • Creates records in required format and structure
Oral Communication	1.2, 1.5-1.7, 2.2, 2.5, 3.1, 3.2	• 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	2.6, 3.4	• Undertakes basic mathematical calculations to review and manipulate workforce data
Navigate the world of work	1.1, 1.4, 1.7, 2.3, 2.4, 2.7	• 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
Interact with others	1.2, 1.5, 2.5, 3.1, 3.2	• Collaborates with others to achieve outcomes, playing an active role in facilitating understanding of procedures
Get the work done	1.1, 2.1, 2.2, 2.7, 3.1	• Plans and implements tasks to achieve outcomes in accordance with 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM507 Manage separation or termination	BSBHRM507A Manage separation or termination	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

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Assessment Requirements for BSBHRM507 Manage separation or termination

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:

- create policies and procedures to manage all aspects of employment termination according to legislative and organisational requirements
- 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.

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 disciplinary procedures
- describe employment contracts including terms and conditions
- outline procedures and grounds for dismissal, suspension, voluntary termination, retirement and redundancy
- summarise relevant industrial relations and employee dismissal legislation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- an appropriate range of documentation and resources normally used in the workplace
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice

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- business technology
- interaction with others
- 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

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BSBHRM509 Manage rehabilitation or return to work programs

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 process and analyse workers compensation and sick leave claims. It also covers the establishment of rehabilitation needs and return to work programs and their monitoring, review and evaluation.

It applies to individuals who manage 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

Workforce Development – Human Resource Management

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 Analyse claims	1.1 Ensure that the organisation has and maintains a current Workers' Compensation insurance policy (or equivalent) as required by the applicable legislation 1.2 Process claims in accordance with organisational policies and legal and insurance requirements 1.3 Dispute claims where insurer or organisational requirements are not met 1.4 Notify rehabilitation provider in accordance with organisational

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ELEMENT	PERFORMANCE CRITERIA
	procedures 1.5 Advise claimants as to whether their claim has been accepted 1.6 Analyse claims to identify the nature of the illness/injury and prepare report/s 1.7 Identify projected period of absence and where rehabilitation assistance is required and ensure arrangements are made in the work team to deal with absence
2 Establish rehabilitation/return to work program	2.1 Ensure consultation occurs between rehabilitation provider and treating doctor 2.2 Ensure consultation occurs between rehabilitation provider, relevant managers and employee 2.3 Consider job redesign, reduced hours and alternative duties in the light of medical advice 2.4 Design a rehabilitation/return to work program to achieve a successful return to work 2.5 Obtain approval for return to work program by relevant managers 2.6 Establish rehabilitation program with employee 2.7 Undertake risk analysis in relation to proposed program and mitigate risk where appropriate 2.8 Commence program as close to the time of the accident/illness as possible
3 Monitor/evaluate rehabilitation/ return to work program	3.1 Encourage regular feedback/communication between provider, supervising manager and employee 3.2 Organise regular contact and support between provider and employee 3.3 Identify breaches of the return to work program and take remedial action promptly 3.4 Refer return to work program to workers compensation authorities where breaches occur 3.5 Modify return to work program where appropriate if it is not delivering the required outcomes 3.6 Evaluate each rehabilitation/return to work program at its conclusion and implement recommendations for system improvement where appropriate

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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, 1.6, 1.7, 2.3, 2.4, 2.7, 3.6	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 2.3, 2.4, 2.5, 2.6, 2.7, 3.3, 3.4, 3.5, 3.6	• 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	1.3, 1.4, 1.5, 1.7, 2.1, 2.2, 2.5, 2.6, 3.3, 3.4	• Uses appropriate vocabulary and non-verbal features in discussions with employees, insurance companies and rehabilitation providers when dealing with claims
Numeracy	2.3, 2.4, 2.7, 3.6	• 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
Navigate the world of work	1.1-1.4	• Ensures knowledge of legislative requirements and products is kept up to date in order to provide accurate information • Takes full 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
Interact with others	1.5, 1.7, 2.1, 2.2, 2.5, 2.6, 3.1, 3.2, 3.4, 3.6	• Uses appropriate protocols and practices to communicate with a range of stakeholders • Implements strategies to discuss health matters sensitively with a range of people • Encourages collaboration between relevant stakeholders
Get the work done	1.1-1.4, 1.6, 1.7, 2.1-2.4, 2.6-2.8, 3.3-3.6	• Plans and organises complex tasks to ensure that that claims are properly processed and to keep the claimant informed

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		• Monitors progress of plans and schedules and reviews and changes them to meet new demands and priorities • Makes critical decisions in complex situations, taking a range of variables into consideration • Evaluates and analyses results of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM509 Manage rehabilitation or return to work programs	BSBHRM509A Manage rehabilitation or return to work programs	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

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Assessment Requirements for BSBHRM509 Manage rehabilitation or return to work programs

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:

- process and analyse workers compensation claims
- process and analyse sick leave claims
- establish, implement, monitor and review a 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
- conduct a risk analysis of a return to work program and mitigate identified risks including
  - assessing the likelihood of a negative event preventing the program meeting its objectives and the likely consequences of such an event
  - action taken to reduce or eliminate identified risk
- assess the strengths and weaknesses of the organisation’s approach to rehabilitation return to work programs
- apply relevant legislation to return to work programs.

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 rehabilitation concepts and return to work procedures
- identify and describe relevant legislation from all levels of government that affects rehabilitation and return to work programs

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- outline the role of workers compensation authorities and tribunal procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- documentation and resources normally used in the workplace
- case studies and, where possible, real situations
- workplace policies and procedures
- 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBHRM510 Manage mediation processes

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 review guidelines and procedures for mediation within an organisation, or on behalf of an organisation.

It applies to individuals who have a role in human resource management of mediation within their organisation, or who may work as consultants providing mediation services to organisations ensuring the policy framework required for the management of mediation and the skills associated with the provision of mediation.

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

Unit Sector

Workforce Development – Human Resource Management

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 Develop mediation guidelines	1.1 Research and collate history of disputes and dispute resolution within the organisation, including triggers for disputes 1.2 Consult identified key stakeholders to determine requirements related to mediation 1.3 Determine mediation requirements within the organisation

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Research and document models and systems for mediation 1.5 Identify and document parameters for a mediation system from consultation and research process 1.6 Draft and validate guidelines for mediation with stakeholders 1.7 Obtain endorsement for guidelines from senior management team 1.8 Circulate guidelines and train mediators in guidelines and procedures
2 Prepare for mediation	2.1 Identify parties in dispute requiring mediation and explain mediation procedure, in accordance with established guidelines 2.2 Obtain agreement and willingness to participate in mediation process 2.3 Conduct separate interviews with parties in dispute and clarify issues 2.4 Verify and document position of each party to the dispute 2.5 Determine boundaries for allowable options in dispute
3 Settle dispute through mediation	3.1 Use a range of communication techniques to mediate 3.2 Establish mutual agreement between parties in dispute 3.3 Formulate options for resolution of dispute and preferences 3.4 Continue with mediation until agreement is reached or time constraints conclude
4 Finalise and review mediation	4.1 Circulate documented agreements to all parties and complete all documentation required by organisational guidelines 4.2 Review effectiveness of mediation, identify improvements and refine mediation guidelines 4.3 Assess and maintain currency of knowledge and skill base of mediators

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

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Reading	1.1, 1.4, 1.5, 1.6, 1.8, 2.1, 2.4, 4.1, 4.2,	• Identifies and interprets relevant information and ideas within a range of contexts to determine all organisational requirements
Writing	1.1-1.7, 2.2, 2.4, 2.5, 3.3, 4.1, 4.2	• Records information for personal use • Creates organisational documentation using appropriate vocabulary and structure
Oral Communication	1.2, 1.6-1.8, 2.2-2.4, 3.1-3.4	• Uses appropriate terminology and non-verbal features when mediating and presenting information • Uses open questioning and active listening when seeking feedback or information from others
Navigate the world of work	2.1, 4.1, 4.2	• Understands and adheres to organisational policies and guidelines
Interact with others	1.2, 1.6, 1.8, 2.2-2.4, 3.1, 3.2, 3.4, 4.1, 4.3	• Selects and uses appropriate conventions and protocols when communicating with a range of people • Participates in conversations relevant to role responding, explaining, negotiating and persuading as required • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective interaction
Get the work done	1.1, 1.3, 1.4, 1.8, 2.5, 3.3, 3.4, 4.2, 4.3	• Plans and organises complex tasks to ensure that that the mediation process progresses according to requirements, ensuring that all parties are kept informed • Monitors progress of plans and schedules and reviews and changes them to meet new demands and priorities • Uses problem-solving processes to make critical decisions in complex situations, taking a range of variables into consideration and interacting with others as required • Evaluates and analyses results of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM510 Manage mediation processes	BSBHRM510A Manage mediation processes	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBHRM510 Manage mediation processes

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, review and disseminate guidelines for mediation
- use effective techniques in the mediation of workplace issues
- reflect on mediation processes and identify improvements
- identify skill gaps in mediation personnel and organise appropriate training.

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 various mediation models
- explain the core components of mediation training for personnel
- summarise relevant organisational frameworks
- outline interviewing techniques
- discuss the benefits of successful mediation processes in the workplace.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- an appropriate range of documentation and resources normally used in the workplace
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice
- business technology

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- interaction with others
- 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

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BSBHRM511 Manage expatriate 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 manage Australian staff working in other countries including planning for offshore work, supporting expatriate staff and arranging for the repatriation of expatriate staff.

It applies to individuals working in a managerial role who direct the work of others working in any industry context and with teams of variable sizes.

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

Unit Sector

Workforce Development – Human Resource Management

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 Plan for offshore work	1.1 Review type of work to be conducted offshore and record roles, tasks and responsibilities of team members 1.2 Research cultural, linguistic and regulatory differences of offshore work site 1.3 Evaluate Australian and host country taxation law as it affects offshore work 1.4 Review and select options for employment contracts and

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ELEMENT	PERFORMANCE CRITERIA
	remuneration arrangements 1.5 Develop selection procedures ensuring employee adaptability 1.6 Create team and individual work plans and timeframes 1.7 Ensure that necessary work permits, visas and immunisations are obtained and that travel and accommodation arrangements are made 1.8 Plan for required technology and equipment for offshore team
2 Support expatriate staff to achieve goals	2.1 Arrange for the provision of cultural awareness training and orientation to new work site and living situation 2.2 Provide relevant organisational information and clarify performance expectations 2.3 Establish clear procedures for open and honest communication 2.4 Manage team dynamics and support team performance 2.5 Review individual and group performance and provide development opportunities 2.6 Assist in the management of conflict and address disputes and grievances 2.7 Recognise and reward contributions of team members
3 Arrange and evaluate repatriation	3.1 Support staff to plan for repatriation 3.2 Assign work roles and responsibilities to returning staff 3.3 Provide mentoring through transition following return to Australia 3.4 Evaluate effectiveness of management strategies and support for expatriated staff

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, 2.5, 3.4	• Reviews, evaluates and applies content from a range of structurally complex texts to aid in managing expatriate staff

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Writing	1.1-1.8, 2.1, 2.3, 2.5, 3.4	• Produces a range of text types matching style of writing to purpose and audience
Oral Communication	2.1, 2.2, 2.4, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3	• Conveys information using structure and language, appropriate to a specific audience • Employs listening and questioning techniques to clarify and confirm understanding
Numeracy	1.3, 1.4	• Selects and interprets mathematical information embedded in familiar texts when dealing with remuneration arrangements
Navigate the world of work	1.1, 1.2, 1.3, 1.5, 2.3, 3.2	• May reflect on designation of roles and responsibilities in order to achieve positive outcomes • Develops or modifies organisational policies and procedures to support organisational goals and to ensure compliance with legislative requirements • Develops and maintains knowledge of cultural, linguistic and regulatory requirements relevant to current role in order to provide assistance to staff
Interact with others	2.1, 2.3-2.7, 3.1-3.3	• Selects and implements appropriate communication protocols to liaise with staff members in a range of work contexts • Adapts personal communication style to build a positive working relationship and show respect for the opinions, values and particular needs of others • Collaborates with others to provide information, feedback and support, avoiding behaviours that are not conducive to a productive environment • Manages conflict in the workplace by recognising contributing factors and implementing appropriate conflict resolution strategies
Get the work done	1.1, 1.2, 1.4-1.8, 2.2, 2.4-2.7, 3.1, 3.4	• Plans and organises complex tasks to ensure that that the repatriation process progresses according to requirements, ensuring that all parties are kept informed • Monitors progress of plans and schedules and reviews and changes them to meet new demands and priorities • Makes critical decisions in complex situations, taking a range of variables into consideration and interacting with others as required • Evaluates and analyses results of decisions to identify opportunities for improvement

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM511 Manage expatriate staff	BSBHRM511A Manage expatriate staff	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

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Assessment Requirements for BSBHRM511 Manage expatriate 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:

- develop and review a plan for managing staff who work offshore including:
  - recording job roles
  - tasks and responsibilities
  - legal and regulatory requirements
  - visas, work permits, immunisations
  - technology and equipment
- review and select options for employment contracts
- develop selection procedures
- develop team and individual work plans and timelines for offshore work
- ensure travel and accommodation arrangements are made
- arrange for the provision of cultural awareness training
- manage individual and team effectiveness
- plan for repatriation of staff including:
  - supporting staff in their planning
  - assigning work roles
  - mentoring through the transition
- evaluate repatriation processes and support 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 cross-cultural awareness requirements for offshore workers

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- describe the cultural, linguistic and regulatory differences in the offshore environment compared to the onshore environment
- explain how performance management systems apply to expatriate staff
- give examples of technology that is suitable for offshore communication
- outline onshore and offshore taxation laws and requirements in relation to expatriate work.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- office equipment and resources
- relevant organisational documentation
- organisational policies and procedures
- legislation, regulations and codes of practice relevant to offshore work
- interaction with others
- 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

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BSBHRM512 Develop and manage performance management processes

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 facilitate implementation of performance management 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 management 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

Workforce Development – Human Resource Management

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 Develop integrated performance-management processes	1.1 Analyse organisational strategic and operational plans to identify relevant policies and objectives to be addressed in **i**ntegrated performance-management processes 1.2 Develop objectives for performance-management processes to support organisational strategy and goals and to build organisational capability

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Design methods and processes for line managers to develop key performance indicators for those reporting to them 1.4 Develop organisational timeframes and processes for formal performance-management sessions 1.5 Ensure performance-management processes are flexible enough to cover the range of the organisation's **employment situations** 1.6 Consult with key stakeholders about the processes and agree on process features 1.7 Gain support for implementation of the performance-management processes
2 Facilitate the implementation of performance-management processes	2.1 Train relevant groups and individuals to monitor performance, identify **performance gaps,** provide feedback and manage talent 2.2 Work with line managers to ensure that performance is monitored regularly and that **intervention** occurs as required and complies with organisational policies and legal requirements 2.3 Support line managers to counsel and discipline employees who continually perform below standard 2.4 Articulate dispute resolution processes where necessary, mediating between line managers and employees 2.5 Provide support to terminate employees who fail to respond to interventions according to organisational protocols and legislative requirements 2.6 Ensure recorded outcomes of performance-management sessions are accessible and stored securely, according to organisational policy 2.7 Regularly evaluate and improve all aspects of performance-management processes in keeping with organisational objectives and policies
3 Coordinate individual or group learning and development	3.1 Design and develop learning and development plans and strategies to encourage effective employee performance 3.2 Deliver learning and development plans according to agreed timeframes, ensuring achievement of specified outcomes

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ELEMENT	PERFORMANCE CRITERIA
	3.3 Contract appropriate providers for performance development, as identified by plans and according to organisational policy 3.4 Monitor learning and development activities to ensure compliance with quality assurance standards 3.5 Negotiate remedial action with providers, where necessary 3.6 Generate reports to advise appropriate managers on progress and success rates of activities

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	• Interprets and critically analyses organisational strategic and operational plans to identify relevant policies and objectives to be addressed
Writing	1.2, 1.3, 1.4, 3.1, 3.6	• Uses broad vocabulary, grammatical structure and conventions appropriate to text when developing objectives, designing methods and processes and reporting
Oral communication	1.6, 2.1, 2.2, 2.4, 3.5	• 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
Numeracy	3.6	• Selects from, and applies, mathematical and problem solving strategies when reporting on success rates of activities
Navigate the world of work	1.1, 1.2, 2.5, 2.6, 2.7, 3.3, 3.4	• 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
Interact with others	1.6, 1.7, 2.1, 2.2, 2.3, 2.4, 3.5	• Selects and implements appropriate communication protocols to liaise with personnel

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		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
Get the work done	1.1-1.7, 2.1-2.7, 3.2, 3.3, 3.4	• Takes responsibility for developing, implementing and monitoring processes and strategies to manage performance • Accepts responsibility for planning, scheduling and sequencing complex tasks to meet organisational and legislative requirements • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Uses digital systems and tools to store, access and organise digital information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM512 Develop and manage performance-management processes	BSBHRM512A Develop and manage performance management processes	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

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Assessment Requirements for BSBHRM512 Develop and manage performance management processes

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, implement, monitor and review an organisational performance management process which supports business goals including analysing the organisational strategic and operational plan
- design methods for the development of key performance indicators and formal performance management sessions by line managers
- consult with stakeholders to gain support
- design, develop, 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 effectively manage performance issues, including dispute resolution and termination of employment
- develop approaches to improve performance and address identified performance gaps.

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:

- list characteristics of a learning organisation
- outline policies and legislation relevant to performance management
- summarise grievance procedures
- explain models for giving feedback and options for skill development
- describe options in the design of performance management processes
- outline role of performance management in relation to broader human resources and business objectives.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- organisational strategic and operational plans
- workplace policies and procedures
- relevant legislation, regulations and codes of practice
- 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

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BSBHRM513 Manage workforce 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 manage planning in relation to an organisation's workforce including researching requirements, developing objectives and strategies, implementing initiatives and monitoring and evaluating trends.

It applies to individuals who are human resource managers 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

Workforce Development – Human Resource Management

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 Research workforce requirements	1.1 Review current data on staff turnover and demographics 1.2 Assess factors that may affect workforce supply 1.3 Establish the organisation's requirements for a skilled and diverse workforce
2 Develop workforce objectives and strategies	2.1 Review organisational strategy and establish aligned objectives for modification or retention of the workforce 2.2 Consider strategies to address unacceptable staff turnover, if

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ELEMENT	PERFORMANCE CRITERIA
	required 2.3 Define objectives to retain required skilled labour 2.4 Define objectives for workforce diversity and cross-cultural management 2.5 Define strategies to source skilled labour 2.6 Communicate objectives and rationale to relevant stakeholders 2.7 Obtain agreement and endorsement for objectives and establish targets 2.8 Develop contingency plans to cope with extreme situations
3 Implement initiatives to support workforce planning objectives	3.1 Implement action to support agreed objectives for recruitment, training, redeployment and redundancy 3.2 Develop and implement strategies to assist workforce to deal with organisational change 3.3 Develop and implement strategies to assist in meeting the organisation's workforce diversity goals 3.4 Implement succession planning system to ensure desirable workers are developed and retained 3.5 Implement programs to ensure workplace is an employer of choice
4 Monitor and evaluate workforce trends	4.1 Review workforce plan against patterns in exiting employee and workforce changes 4.2 Monitor labour supply trends for areas of over- or under-supply in the external environment 4.3 Monitor effects of labour trends on demand for labour 4.4 Survey organisational climate to gauge worker satisfaction 4.5 Refine objectives and strategies in response to internal and external changes and make recommendations in response to global trends and incidents 4.6 Regularly review government policy on labour demand and supply 4.7 Evaluate effectiveness of change processes against agreed objectives

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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, 4.6	• Interprets and critically analyses organisational strategy and data on staff turnover and demographics
Writing	1.3, 2.1, 2.3, 2.4, 2.5, 2.6, 2.7, 2.8, 3.2, 3.3, 4.5	• Uses broad vocabulary, grammatical structure and conventions appropriate to audience and context to develop strategies, plans or reports
Oral communication	2.6, 2.7	• Conveys information using language, format and style appropriate to a specific audience
Numeracy	4.2, 4.3, 4.4	• Extracts and evaluates the mathematical information and applies mathematical and problem-solving strategies when monitoring labour trends and surveying organisational climate
Navigate the world of work	2.1, 2.7, 3.2, 3.3	• Understands and interprets organisational goals r to develop processes, objectives or strategies relevant to own role requirements
Interact with others	2.6, 2.7	• Selects and implements appropriate communication protocols to liaise with personnel in a range of work contexts
Get the work done	1.1, 2.1, 2.8, 3.1 -3.5, 4.1- 4.7	• Sequences and schedules complex activities, monitors implementation and manages relevant communication when researching requirements and developing workforce objectives and strategies • Makes 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 • Anticipates potential problems and uses analytical or lateral thinking processes to formulate contingency plans • Uses a range of digital tools to collect data, and to extract, organise and share information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBHRM513 Manage workforce planning	BSBHRM513A Manage workforce 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

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Assessment Requirements for BSBHRM513 Manage workforce 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:

- review and interpret information from a range of internal and external sources to identify:
  - current staff turnover and demographics
  - labour supply trends factors that may affect workforce supply
  - organisation's workforce requirements objectives and strategies
- manage workforce planning including developing, implementing, monitoring and reviewing strategies to meet workforce needs
- review relevant trends and supply and demand factors that will impact on an organisation's workforce
- develop a workforce plan that includes relevant research and specific strategies to ensure access to a skilled and diverse workforce.

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 current information about external labour supply relevant to the specific industry or skill requirements of the organisation
- outline industrial relations relevant to the specific industry
- describe labour force analysis and forecasting techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

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- an appropriate range of documentation and resources normally used in the workplace
- organisational strategic and operational plans
- organisational policies and procedures
- business technology.

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

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BSBHRM602 Manage human resources strategic 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 develop, implement and maintain a strategic approach to managing human resources in an organisation ensuring that the organisation has the structure and staff to meet current and foreseeable business and performance objectives

It applies to individuals employed as human resource managers after a firm grounding has been established in a range of human resource activities.

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

Unit Sector

Workforce Development – Human Resource Management

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 Research planning requirements	1.1 Analyse strategic plans to determine human resource strategic direction, objectives and targets 1.2 Undertake additional environmental analysis to identify emerging practices and trends that may impact on human resource management in the organisation 1.3 Identify future labour needs, skill requirements and options for sourcing labour supply

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Consider new technology and its impact on job roles and job design 1.5 Review recent and potential changes to industrial and legal requirements
2 Develop human resource strategic plan	2.1 Consult relevant managers about their human resource preferences 2.2 Agree on human resource philosophies, values and policies with relevant managers 2.3 Develop strategic objectives and targets for human resource services 2.4 Examine options for the provision of human resource services and analyse costs and benefits 2.5 Identify appropriate technology and systems to support agreed human resource programs and practices 2.6 Write a strategic human resource plan and obtain senior management support for the plan 2.7 Develop risk management plans to support the strategic human resource plan
3 Implement human resource strategic plan	3.1 Work with others to see that the plan is implemented 3.2 Monitor and review the plan 3.3 Adapt plan should circumstances change 3.4 Evaluate and review performance against plan objectives

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, 1.5, 2.1-2.7, 3.2, 3.3, 3.4	• Organises, evaluates and applies content from a range of structurally complex texts relating to human resource strategic planning
Writing	1.1, 1.2, 1.3, 2.1 - 2.7, 3.3, 3.4	• Communicates complex ideas relating to strategic objectives, matching style of writing to purpose and audience

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Oral Communication	2.1, 2.2, 2.6, 3.1	• 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	1.1, 2.4, 2.6, 2.7	• Selects and interprets mathematical information that may be embedded in a range of tasks and texts to analyse costs and benefits as well as dealing with budgets and risk management plans
Navigate the world of work	1.2, 1.5	• Ensures knowledge of legislative requirements and products is kept up to date in order to provide accurate information • Develops and implements strategies that ensure organisational policies, procedures and regulatory requirements are being met
Interact with others	2.1, 2.2, 2.6, 3.1	• 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
Get the work done	1.1-1.4, 2.3-2.7, 3.2-3.4	• Sequences and schedules complex activities, monitors implementation and manages relevant communication when developing the strategic plan • 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 • Uses digital technologies to manage business operations and actively investigates new technologies for strategic and operational purposes

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.

Options for sourcing labour supply must include consideration of:	• employing a range of recruitment options • hiring casual labour • hiring new graduates or trainees • employing off shore workers

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	• outsourcing • using contractors or consultants.
Human resource plan must include:	• budget • priorities • objectives • timeframes.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM602 Manage human resource strategic planning	BSBHRM602B Manage human resources strategic planning	Updated to meet Standards for Training Packages Minor change to unit title	Equivalent unit

Links

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

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Assessment Requirements for BSBHRM602 Manage human resources strategic 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:

- analyse information from a range of internal and external sources to determine:
  - human resource strategic direction, objectives and targets
  - trends and emerging practices that may have an impact on human resource management
  - 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 human resources
- consult and communicate effectively with relevant stakeholders to develop, implement, monitor and review a strategic human resource plan including:
  - budget
  - priorities
  - agreed objectives, targets, programs and practices based on cost-benefit analysis
  - timeframes
  - risk management
  - evaluation against objectives.

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 human resource practices and functions

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- explain the relevant legislative, regulatory and industrial requirements for the business
- outline common options for sourcing labour including:
  - recruitment options
  - casual labour
  - new graduates or trainees
  - off shore workers
  - outsourcing
  - contractors
  - consultants
- explain the impact of technology on job roles
- outline labour market options for sourcing labour supply
- describe the requirements of a strategic plan.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- relevant legislation, regulations and codes of practice
- the business strategic and operational plan
- workplace policies and procedures
- 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

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BSBHRM604 Manage employee relations

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 to develop and maintain a positive and productive workplace environment. It covers all aspects of employee relations impacting on managers at the strategic level.

It applies to individuals who are non-specialist human resource managers and covers a broad range of employee relations activities.

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

Unit Sector

Workforce Development – Human Resource Management

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 Implement employee relations strategy and policies for own work area	1.1 Ensure employee relations strategy is consistent with organisational strategic objectives 1.2 Develop strategies and policies through the application of a risk management approach and extensive consultation and participation by relevant groups and individuals 1.3 Ensure strategy and policies take account of equal opportunity, family/work relationships and promote the absence of discrimination and/or harassment

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Develop risk management strategies which take account of the withdrawal of labour and other potential outcomes of disputes 1.5 Identify any potential areas of conflict and ensure strategies and policies take account of the objectives of relevant groups and individuals
2 Build and maintain a productive culture	2.1 Negotiate awards, agreements, and contracts which balance organisational objectives and employee rights and obligations 2.2 Identify and meet all legal and organisational requirements within the conditions of employment 2.3 Undertake regular and timely consultation and communication with individuals and relevant groups 2.4 Develop policies and practices to facilitate employee recruitment, retention and satisfaction 2.5 Provide induction programs and training to develop competence and confidence and to ensure work is performed safely and effectively 2.6 Provide opportunities for employees to understand their role and how it contributes to the achievement of organisational objectives 2.7 Develop, regularly review and update individual and team development plans 2.8 Evaluate and revise employee relations policies regularly
3 Resolve employee relations problems	3.1 Establish processes for early intervention to identify and minimise problems or grievances 3.2 Communicate problem solving processes to, and obtain support from, all relevant groups and individuals 3.3 Provide training to develop competence in conflict management, negotiation and dispute resolution 3.4 Obtain specialist advice where appropriate or where formal hearings are required 3.5 Ensure processes are fair, equitable and consistent with all relevant awards agreements and legislation 3.6 Ensure problem solving processes provide for external mediation and conciliation, and arbitration where appropriate
4 Manage diversity	4.1 Develop plans for the promotion of diversity within the organisation 4.2 Openly promote diversity and its benefits within the organisation 4.3 Develop education and communication plans to promote and

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ELEMENT	PERFORMANCE CRITERIA
	encourage diversity 4.4 Develop and implement processes to deal with events which inhibit the organisation from meeting its diversity objectives

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	1.1-1.5, 2.1-2.8, 3.1, 3.3, 3.5, 3.6 4.1, 4.3, 4.4	• Identifies and interprets relevant information and ideas in a range of complex texts relating to employee relations • Recognises relevant information within job specifications and work processes
Writing	1.1-1.5, 2.1, 2.4, 2.7, 2.8, 3.1, 3.2, 3.3, 4.1, 4.3, 4.4	• Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning to manage employee relations
Oral Communication	1.2, 2.1, 2.3, 2.5, 2.6, 3.2, 3.3, 3.4, 4.2	• 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	1.2, 1.4, 2.2	• Selects and interprets mathematical information embedded in a range of tasks and texts
Navigate the world of work	1.1, 1.2, 1.3, 1.4, 1.5, 2.2, 2.4, 2.6, 2.8, 3.5	• Works autonomously making high level decisions to achieve and improve organisational goals • Takes a lead role in the development of organisational goals, roles and responsibilities • Develops and implements strategies that ensure organisational policies, procedures and regulatory requirements are being met • Monitors and reviews the organisations policies, procedures and adherence to legislative requirements to implement and manage change
Interact with others	1.2, 1.3, 1.5, 2.1, 2.3, 2.5-2.7, 3.1-3.4, 3.6, 4.2, 4.4	• Selects and uses appropriate conventions and protocols when communicating with staff at various levels • Influences and fosters a collaborative culture

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		facilitating a sense of commitment and workplace cohesion • Shares knowledge, information and experience openly as an integral part of the working relationship • Understands diversity and seeks to integrate diversity into the work context • Recognises potential for conflict and, working with others, develops organisational processes to deal with conflict
Get the work done	1.1-1.5, 2.4, 2.5, 3.1, 3.3-3.6, 4.1-4.4	• Sequences and schedules a range of complex activities, monitors implementation and manages relevant communication • 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 • Gathers and analyses data and seeks feedback to improve plans and processes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBHRM604 Manage employee relations	BSBHRM604A Manage employee relations	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

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Assessment Requirements for BSBHRM604 Manage employee relations

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:

- consult with relevant stakeholders to develop, implement, monitor and review employee relations strategies and policies including:
  - diversity
  - recruitment
  - induction
  - training and development
  - performance management
- develop an employee relations 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.

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 human resource specialist assistance requirements
- describe the principles of relevant industrial agreements
- determine key result areas of the organisation
- outline organisational plans (strategic, tactical and operational) for human resource planning
- identify and summarise organisational policies relating to balancing family/work relationships

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- outline external and internal organisational support services for employees
- explain performance measurement systems utilised within the organisation
- outline relevant legislative and regulatory requirements
- outline staff development strategies
- explain unfair dismissal rules and due process.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – human resource development field of work and include access to:

- organisational strategic and operational plans
- workplace policies and procedures
- legislation, regulations, codes of practice and industrial awards relevant to the business
- business technology
- 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

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BSBIND201 Work effectively in a business 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 work effectively in a business environment. It includes identifying and working to organisational standards, managing workload, and working as part of a team.

It applies to individuals developing basic skills and knowledge 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

Industry Capability – Industry Context

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 Work within organisational requirements	1.1 Identify and read organisation's requirements and responsibilities and seek advice from appropriate persons, where necessary 1.2 Develop and utilise a current working knowledge and understanding of employee and employer rights and responsibilities 1.3 Comply with relevant duty of care, legal responsibilities and organisational goals and objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify roles and responsibilities of colleagues and immediate supervisors 1.5 Identify standards and values considered detrimental to the organisation and communicate this through appropriate channels 1.6 Identify, recognise and follow behaviour contributing to a safe work environment
2 Work in a team	2.1 Display courteous and helpful manners at all times 2.2 Complete allocated tasks 2.3 Seek assistance when difficulties arise 2.4 Use questioning techniques to clarify instructions or responsibilities 2.5 Identify and display a non-discriminatory attitude in all engagements with staff, management or clients
3 Develop effective work habits	3.1 Identify work and personal priorities and achieve a work/life balance 3.2 Apply time management strategies to work duties 3.3 Observe appropriate dress and behaviour as required by job role

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, 1.4-1.6, 2.2, 3.2	• Reviews documentation to identify relevant information for requirements of job role and organisation
Writing	1.2, 1.3, 1.5, 2.2	• Completes documentation necessary for work tasks and reporting requirements using clear, concise and accurate grammar and language
Oral Communication	1.1-1.6, 2.1-2.5	• 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

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		communicating with others, by behaving courteously and using non-discriminatory language
Navigate the world of work	1.1-1.6	• Follows clear instructions within defined level of responsibility • Identifies and accepts responsibility for working within common law work frameworks • Recognises organisational expectations and follows explicit protocols and procedures • Seeks clarification when required
Interact with others	2.1-2.5	• Recognises 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
Get the work done	3.1-3.3	• Follows clearly defined instructions and sequencing, and monitors own progress for tasks, seeking assistance when necessary

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIND201 Work effectively in a business environment	BSBIND201A Work effectively in a business 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

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Assessment Requirements for BSBIND201 Work effectively in a business 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:

- work within organisational requirements including:
  - complying with duty of care, and goals and objectives of organisation
  - complying with legal responsibilities and seeking advice when necessary
  - understanding workers' rights and responsibilities
  - understanding employers' rights and responsibilities
  - achieving a work/life balance
- work effectively in a team including:
  - completing all tasks
  - seeking assistance when difficulties arise
  - applying communication principles
  - applying appropriate legislation.

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 the legislation that applies to working effectively in a business environment
- outline the organisational documents that are relevant to working effectively
- outline terms and conditions of employment.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – industry context field of work and include access to:

- relevant legislation and codes of practice
- organisational policies and procedures
- relevant workplace documentation and resources
- 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

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BSBIND301 Work effectively in an educational 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 work in educational support roles applying a broad knowledge of the Australian education system, and specific knowledge of an organisation and job role.

It applies to individuals providing educational support services at various levels of responsibility in the education industry.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Develop and maintain knowledge of Australian education system and sectors	1.1 Identify and apply knowledge of Australian education system and its sectors 1.2 Identify potential student pathways between different sectors 1.3 Identify types of programs and qualifications available in different sectors 1.4 Apply knowledge of educational programs and services offered in a specific educational organisation

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Determine relationship of educational support job roles to structure and functions of a specific organisation, and to related job roles in the organisation 1.6 Apply knowledge of educational terminology and acronyms used in a specific education sector
2 Perform education job role tasks effectively	2.1 Identify and carry out educational support job roles and responsibilities 2.2 Apply values of the organisation 2.3 Identify and follow organisational work procedures, protocols and other guidelines 2.4 Comply with legislative and regulatory compliance requirements and related organisational policies and procedures 2.5 Improve own performance and career opportunities by identifying and participating in learning and development activities related to identified needs
3 Work effectively with diversity in an educational context	3.1 Apply an awareness of culture as a factor affecting behaviour of students, clients and colleagues 3.2 Conduct all work-related activities respecting diversity of culture and ability of students, clients and colleagues 3.3 Communicate effectively and respectfully with students, clients and colleagues from diverse cultures and with diverse abilities
4 Practise inclusivity in an educational context	4.1 Identify factors promoting access and equity in an educational organisation and educational support job role 4.2 Recognise factors potentially impacting educational access and equity 4.3 Apply awareness of access and equity issues to requirements of specific educational support job role

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

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Learning	2.5	• Identifies and participates in activities to update and improve own performance
Reading	1.1-1.3, 1.5, 2.1, 2.3-2.5, 4.1	• Identifies and applies information from a range of written and online texts relating to the educational environment, organisation and job role
Oral Communication	1.4, 1.6, 2.1, 2.5, 3.1-3.3, 4.1	• Clarifies needs and potential issues by using questioning and listening techniques • Uses vocabulary and naming conventions relevant to job role and educational sector to communicate information about the organisation and its programs
Navigate the world of work	1.5, 2.2-2.4, 4.1-4.3	• Ensures knowledge of legislative requirements and products is kept up-to-date to provide accurate information • Understands rights and responsibilities and complies with legal and regulatory requirements • Complies with explicit policies and procedures
Interact with others	3.1-3.3, 4.3	• Selects and uses appropriate strategies to establish and maintain communication with others from a variety of cultures and diverse backgrounds • Recognises when personal attributes impact communications in the workplace
Get the work done	1.1, 1.4-1.6, 2.1	• Plans and implements routine tasks and workload according to legislative and organisational requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIND301 Work effectively in an educational environment	BSBIND301A Work effectively in an educational 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

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Assessment Requirements for BSBIND301 Work effectively in an educational 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:

- apply information about Australian education industry sectors and the services, qualifications, and student pathways of the Australian education system and its sectors
- perform work-related tasks to organisational standards, in compliance with relevant legislation and regulations, respecting and promoting diversity
- practice effective communication principles
- identify and participate in professional development opportunities
- recognise potential barriers to access and equity.

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 the scope of Australian educational industry and its sectors
- describe a specific educational organisation structure including:
  - lines of supervision and management
  - communication lines
  - protocols of working relationships with supervisors, managers and other colleagues
- explain standards of performance required of an organisation’s employees, responsibilities, duties and tasks involved at level of specific work role
- outline range of educational programs offered in different sectors in a specific organisation
- identify and describe legislative and regulatory requirements relevant to educational administration work role.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – industry context field of work and include access to:

- legislation, regulations and codes of conduct relevant to job role, occupation or profession
- information on relevant professional associations
- organisation's policies and procedures relevant to job role, occupation or profession
- 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

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BSBIND302 Work effectively in the international education services industry

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 in international education organisations and includes onshore, offshore, public and private organisations from all education sectors.

It applies to individuals providing administration service at various levels of responsibility in the industry.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Access information on work roles and career planning	1.1 Identify information on career prospects in international education industry from appropriate sources 1.2 Identify range of work roles in international education organisations from appropriate sources 1.3 Identify a professional career pathway plan
2 Interact effectively with	2.1 Identify and respect cultural and intercultural protocols of

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ELEMENT	PERFORMANCE CRITERIA
clients	industry and organisation 2.2 Identify and comply with organisational client services policies and guidelines 2.3 Apply appropriate cross-cultural communication skills in interactions with international clients 2.4 Interact effectively with internal and external clients, co-workers and the public 2.5 Work effectively in a team
3 Perform work tasks effectively	3.1 Manage time and prioritise work role tasks efficiently and effectively 3.2 Follow organisational work procedures and work behaviour guidelines 3.3 Seek feedback on personal performance in work role from others, including appropriate organisation officer 3.4 Review own performance and identify any areas for improvement
4 Comply with legislative and regulatory requirements	4.1 Identify legislative and regulatory compliance requirements and codes relevant to work role 4.2 Comply with legislative and regulatory requirements relevant to work role 4.3 Comply with industry codes of practice 4.4 Check validity of work task processes and outcomes in relation to legislative and regulatory compliance and in accordance with organisational procedures
5 Participate in learning to promote career development	5.1 Undertake an audit of relevant work skills, knowledge and attributes 5.2 Determine appropriate ways of bridging gaps in own work skills 5.3 Identify future skills requirements 5.4 Identify and participate in professional development learning opportunities

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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	3.3, 5.1-5.4	• Expands own knowledge and identifies future skills and knowledge needs by seeking opinions of others • Uses a range of approaches to gather information about, and participate in, relevant learning opportunities
Reading	1.1-1.3, 2.1, 2.2, 3.2, 4.1, 4.4, 5.3, 5.4	• Recognises, interprets and analyses online and hard copy documentation to identify career path, legislative and regulatory requirements, cultural protocols and organisational policies and procedures
Writing	1.1-1.3, 3.1, 3.4, 5.1, 5.4	• Completes a range of formatted texts using organisational formats and in accordance with organisational policies and legislative requirements
Oral Communication	1.1, 1.2, 2.1-2.5, 3.3, 5.4	• Elicits views of others by using questioning techniques and listening methods
Navigate the world of work	1.1-1.3, 2.2, 3.2, 4.1-4.4	• Identifies role requirements and future career options • Ensures knowledge of legislative requirements and products is kept up-to-date to provide accurate information • Understands rights and responsibilities and complies with legal and regulatory requirements • Complies with explicit policies and procedures
Interact with others	2.1, 2.3-2.5, 3.3	• Identifies and takes steps to use and follow accepted communication practices and protocols seeking feedback as required • Recognises when personal attributes impact workplace communications • Recognises cultural differences of people in work context and adjusts communication strategies as required
Get the work done	3.1, 5.1, 5.3	• Plans and implements routine tasks and workload making decisions on sequencing and timing, seeking assistance where necessary

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBIND302 Work effectively in the international education services industry	BSBIND302A Work effectively in the international education 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBIND302 Work effectively in the international education services industry

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 a prospective career in international education industry
- apply interpersonal and cross-cultural communication skills effectively to international education services work roles, including adhering to organisation policies and procedures
- identify and apply legislative and regulatory requirements to international education services provision, work role and responsibilities
- identify gaps in own work skills and participate in appropriate professional development.

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 career pathways and roles in international education services industry
- describe cross-cultural communication methods and intercultural protocols for dealing with international clients and co-workers
- explain industry codes of practice, in particular, the national code of practice for registration authorities and providers of education and training to overseas students
- outline legislative and regulatory requirements relevant to work role
- outline organisational policies, procedures and protocols relevant to work role
- outline range of services offered to clients (internal and external) of an international education organisation
- describe responsibilities, duties and tasks of work role.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – industry context field of work and include access to:

- relevant reference materials
- legislation, regulations and codes of conduct relevant to job role, occupation or profession
- organisation policies and procedures relevant to job role, occupation or profession
- interaction with others
- 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

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BSBINM201 Process and maintain workplace information

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 collect, process and store, and maintain workplace information and systems. It also includes the maintenance of filing and records systems.

It applies to individuals who perform a range 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

Knowledge Management – Information Management

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 Collect information	1.1 Collect information in a timely manner and ensure it is relevant to organisational needs 1.2 Use business equipment/technology available in the work area to effectively obtain information 1.3 Apply organisational requirements relating to security and confidentiality in handling information

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ELEMENT	PERFORMANCE CRITERIA
2 Process workplace information	2.1 Use business equipment/technology to process information in accordance with organisational requirements 2.2 Process information in accordance with defined timeframes, guidelines and procedures 2.3 Update, modify and file information in accordance with organisational requirements 2.4 Collate and despatch information in accordance with specified timeframes and organisational requirements
3 Maintain information systems	3.1 Maintain information and filing systems in accordance with organisational requirements 3.2 Identify, remove and/or relocate inactive or dead files in accordance with organisational requirements 3.3 Establish and assemble new files in accordance with organisational requirements 3.4 Update reference and index systems in accordance with 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	Performance Criteria	Description
Reading	1.1-1.3, 2.1-2.4, 3.1-3.4	• Recognises and interprets textual information to complete tasks according to organisational requirements
Writing	1.3, 2.1-2.4, 3.4	• Records simple and routine content using an established format to organise information
Oral Communication	1.1, 1.2	• Uses listening and questioning skills to clarify and adhere to requirements
Numeracy	2.2, 2.4, 3.4	• Comprehends basic mathematical measurements relating to times and number sequences
Navigate the world of work	1.3, 2.1, 2.3, 2.4, 3.1-3.4	• Recognises organisational procedures and understands relevance of legislative requirements
Get the work	1.1-1.3, 2.1, 2.2, 2.4,	• Follows clearly defined instructions and monitors own

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done	3.1-3.3	progress to achieve timelines • Solves problems directly related to tasks, and makes low-impact decisions • Uses digital technologies following instructions regarding data entry and retrieval

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM201 Process and maintain workplace information	BSBINM201A Process and maintain workplace information	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

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Assessment Requirements for BSBINM201 Process and maintain workplace information

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:

- collect and process workplace information according to organisational policies and procedures and related regulatory requirements
- record and document information accurately within expected timeframes
- store, classify and maintain documents and records correctly.

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 key provisions of relevant legislation, regulations, standards and codes of practice that may affect information management
- outline organisational policies and procedures relating to collecting and processing workplace information
- identify and describe organisational recordkeeping/filing systems and security procedures
- describe a range of filing systems including paper-based and software-based.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- office equipment and resources
- examples of workplace information systems.

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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

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BSBINM202 Handle mail

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 receive and distribute incoming mail, and to collect and despatch outgoing mail.

It applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and knowledge of mail 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

Knowledge Management – Information Management

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 Receive and distribute incoming mail	1.1 Ensure incoming mail is checked and registered in accordance with organisational policies and procedures 1.2 Identify titles and locations of company personnel and departments 1.3 Identify and distribute urgent and confidential mail in accordance with organisational requirements 1.4 Sort and deliver mail to nominated person/location in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational requirements 1.5 Record and/or report damaged, suspicious or missing items and take appropriate action in accordance with organisational policies and procedures
2 Collect and despatch outgoing mail	2.1 Collect, check and sort outgoing mail to ensure all items are correctly prepared for despatch in accordance with organisational policies and procedures 2.2 Record and process outgoing mail for despatch in accordance with organisational requirements 2.3 Despatch mail to meet designated timelines
3 Organise urgent and same day deliveries	3.1 Evaluate delivery options and select best option 3.2 Prepare items for urgent delivery in accordance with organisational requirements and carrier specifications 3.3 Organise lodgement or pick-up of emergency deliveries and follow up if 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	1.1-1.5, 2.1, 2.2, 3.2, 3.3	• Recognises and interprets textual information to complete tasks according to organisational requirements
Writing	1.5, 2.2, 3.2, 3.3	• Records simple and routine information using an established format and workplace-specific vocabulary
Oral Communication	1.4, 1.5, 3.3	• Uses questions to clarify and confirm instructions, listens to directions and clearly articulates requirements
Numeracy	1.5, 2.1-2.3, 3.2, 3.3	• Recognises basic mathematical data to verify weight, addresses and registered numbers • Performs basic calculations needed to estimate time for a variety of mail despatches
Navigate the world of work	1.1, 1.3-1.5, 2.1, 2.2, 3.2	• Recognises organisational expectations and follows explicit protocols, policies and procedures

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Interact with others	1.4, 1.5	• Identifies and responds effectively to information associated with job role using appropriate language • Follows accepted communication practices and protocols in performance of tasks
Get the work done	1.2-1.5, 2.1-2.3, 3.1-3.3	• Follows clear instructions within defined level of responsibility • Makes low-impact decisions around clearly defined tasks • Responds to predictable routine problems and implements standard procedures or logical solutions • Uses organisational systems to enter and retrieve data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM202 Handle mail	BSBINM202A Handle mail	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

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Assessment Requirements for BSBINM202 Handle mail

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 a variety of incoming and outgoing mail
- engage mail carriers' to organisational requirements
- apply relevant legislation to handling mail.

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 the Australian postal codes system
- explain key provisions of relevant legislation, regulations, standards and codes of practice that may affect mail handling
- describe organisational policies and procedures specific to handling electronic mail procedural requirements for receiving/despatching and prioritising correspondence
- list the range of mail services available.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- office equipment and resources
- examples of correspondence and parcels for sorting and despatch.

Assessors must satisfy NVR/AQTF assessor requirement

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Links

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BSBINM301 Organise workplace information

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 gather, organise and apply workplace information in the context of an organisation's work processes and knowledge management systems.

It applies to individuals 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

Knowledge Management – Information Management

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 Collect and assess information	1.1 Access product and service information in accordance with organisational requirements 1.2 Ensure methods of collecting information are reliable and make efficient use of available time and resources 1.3 Assess information for clarity, accuracy, currency and relevance to intended tasks 1.4 Use interpersonal skills to access relevant information from

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ELEMENT	PERFORMANCE CRITERIA
	teams and individuals
2 Organise information	2.1 Organise information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements 2.2 Use appropriate technology/systems to maintain information in accordance with organisational requirements 2.3 Collate information and materials and communicate to relevant designated persons 2.4 Identify difficulties organising and accessing information and solve collaboratively with individuals and team members 2.5 Update and store information in accordance with organisational requirements and systems
3 Review information needs	3.1 Actively seek feedback on clarity, accuracy and sufficiency of information to ensure relevance of information and system 3.2 Review the contribution of information to decision making and implement appropriate modifications to collection processes 3.3 Identify future information needs and incorporate modifications to collection processes 3.4 Document future information needs and incorporate in modifications to reporting processes

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, 2.1-2.3, 2.5, 3.2	• Recognises and assesses textual information to complete tasks according to requirements
Writing	2.1, 2.2, 2.3, 2.5, 3.1, 3.4	• Completes workplace records, forms and documentation accurately using correct format, accurate spelling and grammar and terminology specific to requirements
Oral Communication	1.4, 2.3, 2.4, 3.1	• Elicits the view and opinions of others and obtains information by listening and questioning

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		• Participates in a verbal exchange of ideas/solutions using clear language to contribute information and convey issues
Navigate the world of work	1.1, 2.1, 2.5	• Understands rights and responsibilities and complies with explicit policies and procedures and legal and regulatory requirements
Interact with others	1.4, 2.3, 2.4, 3.1	• Identifies and follows accepted communication practices and protocols • Complies with work instructions and contributes to work group discussions using accepted conventions
Get the work done	1.1, 1.2, 2.1, 2.2, 2.4, 3.2, 3.3	• Plans and implements routine tasks and workload making decisions about sequencing and timing • Makes low impact decisions within familiar situations, based on a range of predefined or routine solutions, and evaluates the effectiveness of the outcome • Uses digital technology to access and record information and to communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM301 Organise workplace information	BSBINM301A Organise workplace information	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

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Assessment Requirements for BSBINM301 Organise workplace information

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:

- efficiently and effectively gather, assess, organise and use workplace information as part of own job role
- provide accurate information for defined purposes
- maintain and handle data and documents systematically
- use business technology to manage information
- communicate with colleagues and clients using effective interpersonal skills to obtain and check workplace information
- apply relevant legislation and regulations to workplace information
- monitor, review and modify information 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:

- explain how legislation and regulations may affect the gathering organising and distribution of workplace information
- describe methods for checking validity of information and its sources
- describe organisational recordkeeping and filing systems, security procedures and safe recording practices
- identify workplace policies and procedures relating to workplace information.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- business technology
- workplace policies and procedures
- relevant legislation and codes of practice
- office equipment and resources
- examples of information documents found in the workplace
- 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

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BSBINM302 Utilise a knowledge management 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 access a knowledge management system, use monitoring and review processes to provide feedback and improve own work practices using the system.

This includes a whole range of strategies, methods, activities and techniques used formally and informally by individuals and the organisation (as formalised in a knowledge management system) to identify, collect, organise, store, retrieve, analyse, share and apply knowledge to the work of the organisation.

It applies to individuals who apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of 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

Knowledge Management – Information Management

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 Access and use	1.1 Access knowledge management system to assist with specific

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ELEMENT	PERFORMANCE CRITERIA
knowledge management system	tasks, in line with system procedures 1.2 Administer system, in line with legislative, regulatory and organisational procedures
2 Input to knowledge management system	2.1 Gather, analyse and prepare inputs for contribution to system, in line with procedures 2.2 Check inputs for clarity, accuracy, currency and relevance 2.3 Make inputs to system, in line with procedures 2.4 Analyse requirements of the system and ensure suggestions for improvements are provided to relevant personnel
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 language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Learning	3.2, 3.3	• Builds on knowledge and experience from the use and review of using the knowledge management system, and applies knowledge to improve work practices
Reading	1.1, 1.2, 2.1, 2.2, 2.4, 3.2	• Comprehends textual information, incorporating ideas and concepts from a range of sources, and checks for accuracy and relevance
Writing	1.2, 2.3, 2.4, 3.1, 3.2	• Documents information analysis and emphasises key outcomes using vocabulary and structure appropriate to audience
Oral Communication	2.4, 3.1	• Expresses own observations and opinions using clear and specific language to relevant personnel • Elicits views and information from others and obtains information by listening and questioning
Navigate the	1.1, 1.2, 2.1, 2.3, 3.3	• Understands rights and responsibilities, and complies with explicit procedures in the workplace

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world of work		
Interact with others	2.4, 3.1	• Identifies and takes steps to follow accepted communication practices and protocols when providing feedback
Get the work done	1.1, 1.2, 2.1, 2.4, 3.3	• Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaboration • Uses basic functions of digital technology tools to read, record, search and input required information • Uses analytical processes to review and evaluate the effectiveness of workplace systems and suggest improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM302 Utilise a knowledge management system	BSBINM302A Utilise a knowledge management 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

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Assessment Requirements for BSBINM302 Utilise a knowledge management 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:

- access, use and review a knowledge management system in accordance with organisational policies and procedures
- provide feedback to the organisation about improvements to the knowledge management system
- produce records of outcomes resulting from the use of the 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:

- identify key provisions of relevant legislation, regulations, standards and codes of practice that may affect knowledge management
- describe organisational policies and procedures for knowledge management.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in knowledge management – information management field of work and include access to:

- office equipment and resources
- examples of information documents found in the workplace
- a knowledge management system (which can be a simulated system to satisfy privacy and confidentiality provisions).

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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

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BSBINM303 Handle receipt and despatch of information

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 receive and distribute incoming mail, and to collect and despatch outgoing mail. It also covers collating and despatching bulk mail according to Australia Post specifications.

It applies to individuals who, while under supervision, provide services to support legal practitioners. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

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

Unit Sector

Knowledge Management – Information Management

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 Receive and distribute incoming mail	1.1 Check and register incoming mail to ensure accuracy of records 1.2 Process court documents according to firm's policies and procedures 1.3 Process original documents according to firm's policies and procedures 1.4 Process served documents according to firm's policies and

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ELEMENT	PERFORMANCE CRITERIA
	procedures 1.5 Identify and ensure understanding of titles and locations of company personnel and departments 1.6 Identify and promptly distribute urgent and confidential mail to addressee 1.7 Sort mail and despatch to nominated person/location 1.8 Record damaged, suspicious or missing items and report promptly where necessary
2 Receive and despatch outgoing mail	2.1 Collect outgoing mail from each section of the firm, check and sort all items to ensure they are correctly prepared for despatch 2.2 Determine most appropriate delivery method and select appropriate envelopes and address correctly 2.3 Process outgoing mail correctly 2.4 Record mail in register 2.5 Sort mail according to carrier 2.6 Despatch mail using most appropriate delivery method 2.7 Despatch mail to meet designated timelines
3 Collate and despatch documents for bulk mailing	3.1 Estimate quantities/resources/time to complete bulk mailing of documents correctly 3.2 Collate documents as required 3.3 Sort envelopes and batch in accordance with specifications 3.4 Employ bulk mail interstate satchels where appropriate 3.5 Self-check numerical information 3.6 Lodge batched items in time for delivery by relevant carrier
4 Organise urgent and same day deliveries	4.1 Weigh, package and address items for urgent delivery 4.2 Determine and select cheapest and best option for urgent delivery 4.3 Conduct a follow-up if necessary

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.7, 2.1-2.5, 3.3, 4.3	• Identifies familiar information from a range of sources, compares it against defined criteria and requirements, and checks for accuracy and completeness
Writing	1.1-1.4, 1.8, 2.2-2.4, 3.1, 4.1-4.3	• Accurately records information and completes organisational documents and correspondence using clear language and correct spelling, grammar and terminology
Oral Communication	1.7, 1.8, 2.1, 4.3	• Participates in spoken interactions with others using clear and direct language to convey and clarify information
Numeracy	3.1, 3.5, 4.1, 4.2	• Performs basic calculations to check and confirm numerical information and estimate time requirements
Navigate the world of work	1.2-1.4, 3.3	• Understands own role and associated responsibilities for task completion in compliance with organisational policies and procedures
Interact with others	1.5, 1.8	• Uses a limited range of accepted practices for communicating in work environment
Get the work done	1.1-1.7, 2.1-2.3, 2.5-2.7, 3.1, 3.3, 3.4, 3.6, 4.1-4.3	• Plans and implements routine tasks and workload making limited decisions on sequencing and timing, and follows instructions to set priorities • Makes low-impact decisions within familiar situations, based on a range of predefined or routine solutions and evaluates the effectiveness of the outcome • Responds to predictable routine problems, implementing standard or logical solutions • Uses digital tools for basic reading, recording, searching and communicating information following routine procedures

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINM303 Handle receipt and despatch of information	BSBINM303A Handle receipt and despatch of information	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBINM303 Handle receipt and despatch of information

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:

- register and distribute incoming mail in accordance with firm's policies and procedures, promptly and accurately
- despatch and register outgoing mail in accordance with firm's policies and procedures and carrier's requirements and relevant legislation
- check all details routinely, including addresses, numerical information, spelling and contents of mail for accuracy
- seek clarification from designated person/s and apply correct addressing protocols for despatch with a range of carriers
- apply the principles of legal practitioner/support, responsibilities and obligations for despatch of information.

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 accepted codes of conduct related to duty of care, privacy and confidentiality, and compliance with reasonable direction
- outline criteria for courier selection
- identify and describe organisation's policies and procedures as they apply to despatch
- list roles and locations of a firm's personnel
- describe scope of mail and document handling support role.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- a real or simulated work environment
- typical samples of mail and 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

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BSBINM401 Implement workplace information 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 implement and review the workplace information system. It involves the identification, acquisition, initial analysis and use of appropriate information which plays a significant part in the organisation's effectiveness.

It applies to individuals whose work will normally be carried out within routine and non-routine 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

Knowledge Management – Information Management

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 Identify and source information needs	1.1 Determine and locate information required by teams 1.2 Acquire and review information held by the organisation to determine suitability, accessibility, currency and reliability according to organisational policies
2 Collect, analyse and report information	2.1 Collect information, which is adequate and relevant to the needs of teams, in a timely manner

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Ensure information is in a format suitable for analysis, interpretation and dissemination 2.3 Analyse information to identify and report relevant trends and developments in terms of the needs for which it was acquired
3 Implement information systems	3.1 Implement management information systems effectively to store, retrieve and regularly review data for decision making purposes 3.2 Use technology available in the work area to manage information effectively 3.3 Submit recommendations for improving the information system to designated persons and/or groups
4 Prepare for information system changes	4.1 Collect information about information system future needs in consultation with colleagues, including those who have a specialist role in resource management 4.2 Ensure estimates of information system future needs reflect the organisation's business plans, and customer and supplier requirements 4.3 Support proposals to secure resources by clearly presenting submissions that describe realistic options, benefits, costs and outcomes 4.4 Prepare team members to work with new technology and information system changes

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, 2.2, 2.3, 3.1, 3.2, 3.3, 4.1, 4.2, 4.3, 4.4	• Critically analyses complex documentation from a variety of sources and consolidates information relating to specific criteria to determine requirements
Writing	1.2, 2.1, 2.3, 3.1, 3.3, 4.1, 4.2, 4.3, 4.4	• Develops material for a specific audience using clear and detailed language in order to convey explicit information, requirements and recommendations
Oral	1.1, 3.3, 4.1, 4.3, 4.4	• Uses active listening and questioning and reading of verbal and non-verbal signals to convey and clarify

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Communication		information and to confirm understanding
Numeracy	4.1-4.3	• Selects from and uses a variety of developing mathematical and problem solving strategies to ensure estimates of information reflect the business plan and staff requirements
Navigate the world of work	1.2	• Takes responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulation
Interact with others	1.1, 3.3, 4.1, 4.3, 4.4	• Selects and uses appropriate conventions and protocols when communicating with clients and co-workers in a range of work contexts • Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met
Get the work done	1.1, 1.2, 2.1, 2.3, 3.1, 3.2, 4.1, 4.2	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Contributes to continuous improvement of current work practices by applying basic principles of analytical thinking • Uses familiar digital technologies and systems to access, enter, present and communicate data and information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM401 Implement workplace information system	BSBINM401A Implement workplace information 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

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Assessment Requirements for BSBINM401 Implement workplace information 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:

- identify, source and analyse information to determine
  - information system needs
  - whether it is fit for purpose
  - trends and developments
- implement and review the workplace information system
- review a workplace information system and prepare and present a submission recommending 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:

- identify the information systems that are, or should be, available in the workplace
- explain the information management systems and technology typically associated with the workplace including:
  - budgets and financial management systems
  - customer information software or records
  - databases
  - personal digital assistant (PDA)
  - product and service information
  - project management software
  - record management systems
  - spreadsheets.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- business technology
- a workplace information system
- workplace policies and procedures.

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

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BSBINM501 Manage an information or knowledge management 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 organise training for others for an information or knowledge management system and to manage the use of the system.

It applies to individuals who are responsible for seeing that key information and corporate knowledge are retained, accessible to others and improve business outcomes.

The unit applies to information or knowledge management systems which 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

Knowledge Management – Information Management

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 Organise learning to use information or knowledge management system	1.1 Identify learning needs of relevant personnel and stakeholders for input into and use of an information or knowledge management system 1.2 Identify and secure human, financial and physical resources

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ELEMENT	PERFORMANCE CRITERIA
	required for learning activities to use an information or knowledge management system 1.3 Organise and facilitate learning activities 1.4 Promote and support use of the system throughout the organisation 1.5 Monitor and document effectiveness of learning activities
2 Manage use of information or knowledge management system	2.1 Ensure implementation of policies and procedures for the information or knowledge management system are monitored for compliance, effectiveness and efficiency 2.2 Address implementation issues and problems as they arise 2.3 Monitor integration and alignment with data and information systems 2.4 Collect information on achievement of performance measures 2.5 Manage contingencies such as system failure or technical difficulties by accessing technical specialist help as required
3 Review use of information or knowledge management system	3.1 Analyse effectiveness of system and report on strengths and limitations of the system 3.2 Review business and operational plan and determine how effectively the system is contributing to intended outcomes 3.3 Make recommendations for improvement to system, policy or work practices

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	1.1-1.5, 2.1-2.5, 3.1-3.3	• Researches and critically analyses documentation from a variety of sources to determine requirements
Writing	1.1-1.5, 2.1-2.4, 3.2, 3.3	• Prepares and produces documentation for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations

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Oral Communication	1.1, 1.2, 1.3, 1.4, 2.2, 2.5, 3.3	• 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
Navigate the world of work	2.1, 3.3	• Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulation • Modifies or develops organisational policies and procedures to comply with legislative requirements and organisation goals
Interact with others	1.1-1.4, 2.5, 3.3	• Implements strategies for a diverse range of colleagues and clients in order to build rapport and foster strong relationships • 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
Get the work done	1.1-1.5, 2.1-2.5, 3.1, 3.2	• 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 • Applies systematic and analytical processes to address problems and make decisions in complex situations • Investigates new and innovative ideas as a means to continuously improve, work practices and processes • Uses and investigates new digital technologies and applications to manage and manipulate data and communicate effectively with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM501 Manage an information or knowledge	BSBINM501A Manage an information or knowledge	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
management system	management system		

Links

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

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Assessment Requirements for BSBINM501 Manage an information or knowledge management 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:

- identify learning needs and plan and implement learning activities to enable personnel to use information or knowledge management system including
  - providing human, financial and physical resources as required
  - use of coaching, mentoring, information sessions, workshops, training programs and e-learning as appropriate
- monitor performance and address issues and contingencies as they arise including
  - accessing technical specialists as required
  - correct application of policies and procedures for the information or knowledge management system
  - alignment and effectiveness of the policies and procedures
  - effectiveness of information or knowledge management system for intended outcomes
- recommend improvements to systems, policies and practices as appropriate.

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, codes of practice and national standards relevant to privacy, freedom of information and knowledge management
- explain organisational policies and procedures including:
  - records management
  - information management
  - customer service
  - commercial confidentiality

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- describe the organisational operations and existing data and information systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- relevant legislation, regulation, standards and codes
- relevant workplace systems, documentation and resources
- 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

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BSBINM601 Manage knowledge and information

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 maintain information processing systems to support decision making; and to optimise the use of knowledge and learning throughout the organisation.

It applies to individuals who are responsible for ensuring that critical knowledge and information are readily available to review the organisation's performance and to ensure its effective functioning. It applies to a wide range of knowledge and information 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

Knowledge Management – Information Management

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 Obtain information relevant to business issues	1.1 Review staff and customer feedback and business performance data 1.2 Identify, define and analyse business problems and issues 1.3 Identify information required to reach a decision on problems/issues

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Source and gather reliable information 1.5 Test information for reliability and validity and reject where contradictory or ambiguous 1.6 Utilise formal and informal networks to access corporate knowledge/memory not held in formal systems and review appropriately
2 Analyse information and knowledge	2.1 Ensure objectives for analyses are clear, relevant and consistent with the decisions required 2.2 Identify patterns and emerging trends correctly and interpret as to cause and effect 2.3 Utilise statistical analyses and interpretation where appropriate 2.4 Undertake sensitivity analysis on any proposed options 2.5 Ensure documentation reflects a logical approach to the evaluation of the evidence and conclusions drawn 2.6 Adjust management information systems/decision support systems to meet information processing objectives
3 Take decisions on business issues identified	3.1 Ensure sufficient valid and reliable information/evidence is available to support a decision 3.2 Utilise risk management plans to determine acceptable courses of action 3.3 Utilise appropriate quantitative methods to assist decision making 3.4 Consult specialists and other relevant groups and individuals 3.5 Ensure decisions taken are within the delegation/accountability of the group/individual responsible 3.6 Make decisions in accordance with organisational guidelines and procedures 3.7 Ensure decisions taken are consistent with organisational objectives, values and standards 3.8 Ensure decisions are taken in a timely manner
4 Disseminate information to the organisation	4.1 Ensure advice/information needs are documented and are specific to location, format and time line requirements 4.2 Document information and update databases regularly 4.3 Design and test systems to meet information requirements of decision makers 4.4 Ensure information is up-to-date, accurate, relevant and

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ELEMENT	PERFORMANCE CRITERIA
	sufficient for the recipient 4.5 Develop communication plans and disseminate information 4.6 Adhere to confidentiality/privacy policies in the transmission/release of information/advice 4.7 Review and update communication plans regularly 4.8 Utilise technology which provides optimum efficiency and quality 4.9 Maintain corporate knowledge and ensure security

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	1.1-1.6, 2.1-2.6, 3.1, 3.2, 3.3, 4.1-4.9	• Organises, evaluates and critiques ideas and information from a wide range of complex texts. • Draws on a broad range of strategies to build and maintain understanding throughout complex texts.
Writing	1.2, 1.3, 1.4, 1.5, 1.6, 2.1, 2.2, 2.4, 2.5, 2.6, 3.3, 3.4, 4.1, 4.2, 4.3, 4.4, 4.5, 4.7, 4.9	• Generates complex written texts, demonstrating control over a broad range of writing styles and purpose • Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning
Oral Communication	1.6, 3.4, 4.5	• Encourages discussions and applies appropriate listening and questioning techniques while consulting with specialists and other relevant personnel • Presents complex information in formal situations using language, tone and pace appropriate for the audience and purpose
Numeracy	1.1, 1.2, 1.5, 2.2-2.4, 3.1, 3.3, 4.3	• Uses highly-developed numeracy skills to interpret complex statistical and researched information, performing calculations on data to render it usable and reportable
Navigate the world of work	2.6, 3.6, 3.7	• Works autonomously making high level decisions to achieve and improve organisational goals • Takes a lead role in the development of organisational

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		goals, roles and responsibilities • Develops and implements strategies that ensures organisational policies, procedures and regulatory requirements are being met • Monitors and reviews the organisations policies, procedures and adherence to legislative requirements in order to implement and manage change
Interact with others	1.6, 3.4, 4.5, 4.6	• Uses a variety of relevant communication tools and strategies to access and share information and to build and maintain effective working relationships
Get the work done	1.1-1.5, 2.1, 2.2, 2.4-2.6, 3.1-3.3, 3.6-3.8, 4.1, 4.3-4.5, 4.7, 4.8, 4.9	• Plans and manages activities with implications for the whole organisation • Gathers and analyses data and seeks feedback to improve plans and processes • Makes high impact decisions, analysing input from a range of sources and, where appropriate, drawing on experience • Explores new and innovative ideas through analysis and critical thinking • Uses digital technologies to manage business operations and actively investigates new technologies for strategic and operational purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINM601 Manage knowledge and information	BSBINM601A Manage knowledge and information	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

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Assessment Requirements for BSBINM601 Manage knowledge and information

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:

- 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
  - using formal and informal networks to source information not held in formal systems
  - identifying and accessing sources of reliable information
  - using technology as appropriate
  - consultation with stakeholders and specialists
- contribute information and the outcomes of analysis to decision making
- disseminate information to relevant groups and individuals including:
  - documenting information and updating databases
  - meeting identified needs of recipients
  - adhering to legal and organisational requirements for privacy and security
  - developing and implementing communication plans
- design, test and adjust information systems to meet needs and objectives including:
  - management information systems and decision support systems
  - use of technology for optimum efficiency and quality
  - storage and retrieval of information.

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

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Knowledge Evidence

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

- give examples of existing and emerging technologies and how they can be used in knowledge and information management
- explain statistical analysis and other quantitative methods commonly used in decision making including several of:
  - correlation calculations
  - long-term trend analyses
  - probability assessment
  - regulation analyses
  - short to medium-term trend analyses
  - dynamic programming
  - linear programming
  - queuing theory
  - simulation
  - transportation methodology
- outline the key features of management information systems and decision support systems
- explain how to utilise risk management plans to determine acceptable courses of action.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – information management field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- relevant technology and equipment
- 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

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BSBINN201 Contribute to workplace innovation

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 make a pro-active and positive contribution to workplace innovation.

It applies to individuals working in any industry or community context, in both small and large organisations who take a pro-active approach to identifying, suggesting and developing ideas about better ways of doing things at a practical operational level in a specific area of activity. While the individual's overall work is undertaken with some supervision and guidance, they apply discretion, judgement and effective interpersonal skills in order to contribute to workplace innovation.

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

Unit Sector

Creativity and Innovation – Innovation

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 Identify opportunities to do things better	1.1 Be aware of own role in workplace innovation 1.2 Proactively identify opportunities for improvement in own area of work 1.3 Gather and review information which may be relevant to ideas and which might assist in gaining support for ideas

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ELEMENT	PERFORMANCE CRITERIA
2 Discuss and develop ideas with others	2.1 Identify people who could provide input into ideas for improvements 2.2 Select the best way of approaching people to begin sharing ideas 2.3 Seek feedback on improvement of ideas, and discuss and develop options and possible variations 2.4 Review and select ideas for follow up based on feedback and further review
3 Address the practicalities of change	3.1 Take action to implement routine changes in consultation with others and within scope of own responsibility 3.2 Identify and articulate issues and practical processes for implementing proposed ideas 3.3 Present ideas and practical suggestions to the appropriate people about how improvements could be made

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, 2.4, 3.2	• Categorises, interprets and reviews information from a range of sources to generate ideas relevant to the workplace
Writing	3.2, 3.3	• Communicates information using clear language and formats appropriate for the audience
Oral Communication	2.3, 3.1, 3.2, 3.3	• Actively participates in verbal exchanges of ideas and elicits the view and opinions of others by listening and questioning • Uses clear and relevant language to clarify workplace issues and promote ideas
Numeracy	1.3, 3.2	• Performs basic mathematical calculations to estimate time and cost in relation to implementation of ideas
Navigate the world of work	1.1, 1.2, 3.1	• Understands responsibilities of own role
Interact with	2.3, 3.1-3.3	• Follows accepted communication practices and protocols when discussing or presenting ideas to others

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others		• Seeks and takes into account perspectives and opinions of others
Get the work done	1.2, 1.3, 2.1, 2.2, 2.4, 3.1-3.3	• Plans and implements routine tasks making limited decisions and seeking assistance, when necessary • Uses analytical or lateral thinking processes to identify improvements or new ways of approaching tasks • Identifies and anticipates operational problems and develops possible solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINN201 Contribute to workplace innovation	BSBINN201A Contribute to workplace innovation	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

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Assessment Requirements for BSBINN201 Contribute to workplace innovation

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 ideas for improvements and use information from a range of sources including other people to review and select ideas to put forward for implementation
- communicate the ideas and seek input from others in order to identify how the ideas could be implemented
- implement routine changes within scope of responsibility.

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 role of individuals in suggesting and making improvements and the importance of pro-active involvement
- list the positive impacts and the challenges of change and innovation
- provide examples of the types of changes that can occur as a result of effective individual participation within own scope of responsibility
- give examples of the types of changes that are within and outside own scope of responsibility
- list typical reasons why suggested improvements or innovations may not be implemented, including operational and management constraints
- explain how to prepare and communicate ideas for improvement to maximise likelihood of support.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation and include access to:

- workplace documents
- case studies and, where possible, real situations
- office equipment and resources
- 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

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BSBINN301 Promote innovation in a team 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 be an effective and proactive member of an innovative team.

It applies to individuals who play a proactive role in demonstrating, encouraging or supporting innovation in a team environment. The individual may be a team participant or a team leader. Teams may be formal or informal and may comprise a range of personnel.

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

Unit Sector

Creativity and Innovation – Innovation

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 Create opportunities to maximise innovation within the team	1.1 Evaluate and reflect on what the team needs and wants to achieve 1.2 Check out information about current or potential team members' work in the context of developing a more innovative team 1.3 Bring people into the team or make suggestions for team members based on what needs to be achieved and the potential for cross fertilising ideas

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Acknowledge, respect and discuss the different ways that people may contribute to building or enhancing the team
2 Organise and agree effective ways of working	2.1 Jointly establish ground rules for how the team will operate 2.2 Agree and communicate responsibilities in ways that encourage and reinforce team-based innovation 2.3 Agree and share tasks and activities to ensure the best use of skills and abilities within the team 2.4 Plan and schedule activities to allow time for thinking, challenging and collaboration 2.5 Establish personal reward and stimulation as an integral part of the team's way of working
3 Support and guide colleagues	3.1 Model behaviour that supports innovation 3.2 Seek external stimuli and ideas to feed into team activities 3.3 Proactively share information, knowledge and experiences with other team members 3.4 Challenge and test ideas within the team in a positive and collaborative way 3.5 Proactively discuss and explore ideas with other team members on an ongoing basis
4 Reflect on how the team is working	4.1 Debrief and reflect on activities and on opportunities for improvement and innovation 4.2 Gather and use feedback from within and outside the team to generate discussion and debate 4.3 Discuss the challenges of being innovative in a constructive and open way 4.4 Take ideas for improvement, build them into future activities and communicate key issues to relevant colleagues 4.5 Identify, promote and celebrate successes and examples of successful innovation

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.2, 4.2	• Interprets and analyses textual information, from a wide range of sources, to identify information relevant to team activities
Writing	2.2, 3.3, 4.4	• Uses clear language and formats appropriate for the audience to highlight and present specific information
Oral Communication	1.2, 1.3, 1.4, 2.1, 2.2, 3.5, 4.1, 4.2, 4.3, 4.4, 4.5	• 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 activities in formal and informal situations
Numeracy	1.2, 4.2	• Interprets numeric information relevant to team activities
Navigate the world of work	1.1, 3.1, 3.2, 3.5	• Understands the nature and purpose of own role and how it affects others in the work context
Interact with others	1.1-1.4, 2.1, 2.2, 3.1, 3.2, 3.4, 3.5, 4.1, 4.2, 4.4, 4.5	• Uses inclusive techniques to initiate, contribute and promote discussion amongst potentially diverse team members • Recognises the importance of establishing and building effective working relationships • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.3, 1.4, 2.2, 2.4, 2.5, 3.2, 3.4, 4.2, 4.4, 4.5	• Plans, sequences and prioritises tasks for efficient and effective outcomes • Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking • Uses problem-solving processes to address less predictable problems, and when appropriate, seeking input from others • Reflects on outcomes and further explores own and the team’s role in implementing innovation

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINN301 Promote innovation in a team environment	BSBINN301A Promote innovation in a team 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

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Assessment Requirements for BSBINN301 Promote innovation in a team 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:

- apply practices that promote innovation within a team including:
  - modelling open and respectful communications
  - contributing to the make-up and rules of the team
  - planning and scheduling of activities
  - reflecting on activities, feedback and challenges to identity improvement options
- encourage others to contribute to innovation in the team
- implement improvements and communicate about them.

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 what innovation is, the different types of innovation and the benefits of innovation
- describe the internal and external factors that contribute to a team becoming and remaining innovative including:
  - team characteristics
  - the role of group dynamics and diversity
  - broader environmental factors
- explain how activities can encourage or hinder innovation in a team including:
  - allocation of time and activities
  - modelling behaviour
  - rewards and recognition
  - communications

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- feedback.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation and include access to:

- workplace documents
- case studies and, where possible, real situations
- office equipment and resources
- 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

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BSBINN501 Establish systems that support innovation

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 conceptualise and establish new systems that support and encourage innovation in the workplace.

It applies to individuals including managers, senior operational personnel and/or internal/external specialists who are responsible for the development of new systems in small and large organisations in any community or industry context.

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

Unit Sector

Creativity and Innovation – Innovation

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 Research context for new system development	1.1 Explore and analyse the impact of systems in the overall context of innovation 1.2 Explore and gain clarity around system objectives, particularly in relation to innovation 1.3 Analyse current organisational systems to identify gaps or barriers to innovation 1.4 Research and analyse current and emerging information about

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ELEMENT	PERFORMANCE CRITERIA
	systems in other organisations and contexts 1.5 Evaluate the resources and other commitment required to foster innovation 1.6 Identify key stakeholders who can play a role in conceptualising or supporting new system ideas
2 Generate system concepts and options	2.1 Create system concepts that will foster innovation using individual and group techniques 2.2 Evaluate and discuss a range of ideas with relevant stakeholders 2.3 Clearly articulate the ways in which innovation is better supported by system ideas and options 2.4 Clearly articulate how the system itself is innovative 2.5 Expose ideas and options to ongoing testing, exploration and challenge 2.6 Select and refine system ideas that meet the workplace requirements and which are both feasible and innovative
3 Develop a plan for the system	3.1 Determine the need for specialised assistance and integrate into system planning 3.2 Analyse the potential impact of the new system on people, resources and other organisational practices 3.3 Consult with all stakeholders who will be involved with, or affected by, the new system 3.4 Develop an operational plan for the system, with budget, timelines and responsibilities 3.5 Develop a communication strategy to support the introduction of the new system 3.6 Evaluate the coaching and training needs of those who will use the system and plan a learning and development strategy
4 Trial the system	4.1 Present and consult on system proposals with relevant stakeholders 4.2 Analyse and integrate feedback into the system development process 4.3 Determine appropriate context and parameters for the trial process 4.4 Initiate the trial, taking account of all required consultative, coaching and technical issues 4.5 Monitor and review the trial in relation to its goals for fostering

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ELEMENT	PERFORMANCE CRITERIA
	innovation 4.6 Open the improvement process to ongoing collaborative input and challenge 4.7 Adjust system to reflect evaluation feedback

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	• Researches, analyses and evaluates textual information, from a wide range of sources, to identify information relevant to systems that support innovation
Writing	2.3, 2.4, 2.5, 3.3, 3.4, 3.5, 3.6, 4.1, 4.2	• Develops complex plans and strategies using language and format appropriate to the audience and purpose
Oral Communication	2.1, 2.2, 2.3, 2.4, 3.3, 4.1, 4.6	• Presents ideas and concepts to a range of audiences varying vocabulary and non-verbal features to suit the audience • Uses active listening and questioning to discuss and clarify information and to confirm understanding
Numeracy	3.4	• Interprets, analyses and presents numeric or financial information in complex documents
Navigate the world of work	1.1-1.4	• Takes responsibility for researching and evaluating systems to achieve organisational outcomes in innovation according to role requirements
Interact with others	2.1, 2.2, 2.5, 4.1, 4.4, 4.6	• Identifies and uses appropriate conventions and protocols when communicating with stakeholders from diverse backgrounds • Uses inclusive and collaborative techniques to negotiate, influence and elicit the views and opinions of a wide range of stakeholders
Get the work done	1.1-1.6, 2.1, 2.6, 3.1, 3.2, 3.4-3.6, 4.2-4.7	• Accepts responsibility for planning and implementing systems and strategies to achieve organisational goals, negotiating key aspects with others • Develops new and innovative ideas through exploration, analysis and critical thinking

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		• Uses digital tools or systems to access, organise, integrate and share information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINN501 Establish systems that support innovation	BSBINN501A Establish systems that support innovation	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

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Assessment Requirements for BSBINN501 Establish systems that support innovation

Modification History

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

Performance Evidence

Evidence of ability to:

- design a new system for the organisation that clearly support s innovation, is innovative and is based on:
  - analysis of the organisation's objectives, current systems, resources and barriers in relation to innovation
  - individual and group techniques with stakeholders to generate, test and evaluate several concepts and options for the new system
- consult with and analyse and integrate feedback from relevant stakeholders to develop a plan for the new system that addresses:
  - the need for external assistance
  - the impact of the new system on people, resources and other organisational practices
  - budget, timelines, responsibilities
  - a communication strategy
  - a learning and development strategy
- trial the new system including taking account of all consultative, coaching and technical issues and review it in relation to its goals for fostering innovation
- open the improvement process to ongoing collaborative input and challenge
- adjust system to reflect evaluation feedback.

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 how the new system supports innovation in the organisation

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- explain the concepts and theories of change management including ways of introducing change in different organisational contexts and change management communication strategies
- explain the concepts and theories of innovation and how these link to innovation in practice
- explain techniques for generating, testing and evaluating concepts and options for new systems
- analyse the technical context in which the system is being developed
- outline the typical ways in which systems may present barriers to innovation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation and include access to:

- workplace documents and
- case studies and, where possible, real situations
- office equipment and resources
- interaction with others
- current industry technology used in the development of systems.

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

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BSBINN502 Build and sustain an innovative work 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 create an environment that enables and supports the application of innovative practice focusing on a holistic approach to the integration of innovation across all areas of work practice.

It 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. The work group could be permanent or temporary in nature.

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

Unit Sector

Creativity and Innovation – Innovation

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 Lead innovation by example	1.1 Make innovation an integral part of leadership and management activities 1.2 Demonstrate positive reception of ideas from others and provide constructive advice 1.3 Establish and maintain relationships based on mutual respect and trust

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Take considered risks to open up opportunities for innovation 1.5 Regularly evaluate own approaches for consistency with the wider organisational or project context
2 Establish work practices that support innovation	2.1 Consult on and establish working conditions that reflect and encourage innovative practice 2.2 Introduce and maintain workplace procedures that foster innovation and allow for rigorous evaluation of innovative ideas 2.3 Facilitate and participate in collaborative work arrangements to foster innovation 2.4 Build and lead teams to work in ways that maximise opportunities for innovation
3 Promote innovation	3.1 Acknowledge suggestions, improvements and innovations from all colleagues 3.2 Find appropriate ways of celebrating and promoting innovation 3.3 Promote and reinforce the value of innovation according to the vision and objectives of the organisation or project 3.4 Promote and support the evaluation of innovative ideas within the wider organisational or project context
4 Create a physical environment which supports innovation	4.1 Evaluate the impact of the physical environment in relation to innovation 4.2 Collaborate with colleagues about ideas for enhancing the physical work environment before taking action 4.3 Consider potential for supporting innovation when selecting physical resources and equipment 4.4 Design, fit-out and decorate workspaces to encourage creative mindsets, collaborative working and the development of positive workplace relationships
5 Provide learning opportunities	5.1 Pro-actively share relevant information, knowledge and skills with colleagues 5.2 Provide or encourage formal and informal learning opportunities to help develop the skills needed for innovation 5.3 Create opportunities in which individuals can learn from the experience of others

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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, 4.1, 5.1	• Interprets and evaluates information that may deal with complex ideas related to issues both within and outside a given workplace context
Writing	3.3, 3.4, 5.1	• Develops information for others using language to suit the context and audience
Oral Communication	1.2, 2.1, 2.3, 3.1, 3.3, 3.4, 5.1	• 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
Navigate the world of work	1.1, 1.5, 2.1, 2.2, 3.3, 5.1, 5.2	• Takes responsibility for implementing practices and procedures to achieve organisational objectives in innovation according to role requirements • Stays up to date with professional development options to provide relevant information to staff
Interact with others	1.2, 1.3, 2.3, 2.4, 3.1-3.4, 4.2, 5.1, 5.3	• Uses appropriate 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
Get the work done	1.1, 1.4, 1.5, 2.1, 3.2, 3.3, 4.1, 4.3, 4.4, 5.2, 5.3	• 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 • Develops new and innovative ideas through exploration, evaluation, analysis and critical thinking • Facilitates a climate where people feel comfortable suggesting and discussing improvements or new ideas • Uses problem solving processes to identify, assess and respond to challenges and risks around innovation

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINN502 Build and sustain an innovative work environment	BSBINN502A Build and sustain an innovative work 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

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Assessment Requirements for BSBINN502 Build and sustain an innovative work 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 maximise opportunities for innovation by:

- establishing procedures and practices that foster innovation including:
  - collaborative work arrangements
  - building team capacity to contribute to innovation
  - providing formal and informal learning opportunities
  - evaluating ideas
  - celebration and promotion of innovation
  - consultation
  - respectful communications and sharing of ideas and feedback
- reinforcing the value of innovation to the vision and objectives of the organisation,
- model ling behaviour including being receptive to ideas, giving constructive advice, evaluating own work, establishing and maintaining relationships based on mutual respect and trust, taking considered risks that provide opportunities for innovation
- evaluating how the physical environment can be enhanced to support innovation and collaboration and collaborating on ideas to make improvements including in the selection of physical resources and equipment, and the design, fit-out and decoration of the workspaces
- making changes to a workspace that will encourage innovation in at least one of
  - design
  - fit-out
  - decoration.

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

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Knowledge Evidence

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

- explain the concepts and theories of innovation and how these link to innovation in practice
- explain the context for innovation in the workplace including core business values, overall objectives, broader environmental context and the need to ensure the value and benefit of innovative ideas and projects
- discuss the factors and tools that can motivate individuals to use creative thinking and apply innovative work practices
- research the legislative framework that impacts on operations in the relevant workplace context
- explain how different approaches to management and leadership can support or hinder innovation
- discuss typical challenges and barriers to innovation within teams and organisations and ways of overcoming these including rewarding and celebrating innovation, coaching and learning, modelling behaviour and managing the physical environment.
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation and include access to:

- workplace documents
- case studies and, where possible, real situations
- office equipment and resources
- 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

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BSBINN601 Lead and manage organisational change

Modification History

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

Application

This unit describes skills and knowledge required to determine strategic change requirements and opportunities; and to develop, implement and evaluate change management strategies.

It 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, human resources development, or work in a strategic policy or planning area.

The unit takes a structured approach to change management and applies to people with considerable work experience and organisational knowledge.

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

Unit Sector

Creativity and innovation – innovation

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 Identify change requirements and opportunities	1.1 Identify strategic change needs through an analysis of organisational objectives 1.2 Review existing policies and practices against strategic objectives to identify where changes are required

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Monitor the external environment to identify events or trends that impact on the achievement of organisational objectives 1.4 Identify major operational change requirements due to performance gaps, business opportunities or threats, or management decisions 1.5 Review and prioritise change requirements or opportunities with relevant managers 1.6 Consult stakeholders, specialists and experts to assist in the identification of major change requirements and opportunities
2 Develop change management strategy	2.1 Undertake cost-benefit analysis for high priority change requirements and opportunities 2.2 Undertake risk analysis and apply problem solving and innovation skills to identify barriers to change and agree and record mitigation strategies 2.3 Develop change management project plan 2.4 Obtain approvals from relevant authorities to confirm the change management process 2.5 Assign resources to the project and agree reporting protocols with relevant managers
3 Implement change management strategy	3.1 Develop communication or education plan, in consultation with relevant groups and individuals, to promote the benefits of the change to the organisation and to minimise loss 3.2 Arrange and manage activities to deliver the communication or education plans to relevant groups and individuals 3.3 Consult with relevant groups and individuals for input into the change process 3.4 Identify and respond to barriers to the change according to risk management plans 3.5 Action interventions and activities set out in project plan according to project timetable 3.6 Activate strategies for embedding the change 3.7 Conduct regular evaluation and review and modify project plan where appropriate to achieve change program objectives

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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, 2.2	• Interprets detailed information that may deal with complex ideas related to issues both within and outside the workplace context
Writing	2.1, 2.2, 2.3, 2.4, 3.1	• 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	1.6, 2.2, 2.4, 2.5, 3.3	• Discusses and seeks information using appropriate structure and language for the particular audience • Uses questioning and active listening to clarify or confirm understanding
Numeracy	2.1, 2.3, 2.3	• Interprets, analyses and presents numeric/financial information in complex documents
Navigate the world of work	1.1-1.6, 2.4, 2.5, 3.1, 3.2	• Takes a lead role in the development of organisational strategic goals and associated roles and responsibilities
Interact with others	1.5, 1.6, 2.4, 2.5, 3.1-3.3	• 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
Get the work done	1.1-1.5, 2.1-2.5, 3.1, 3.2, 3.4-3.7	• 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 • Develops new and innovative ideas through exploration and lateral thinking

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINN601 Lead and manage organisational change	BSBINN601B Manage organisational change	Updated to meet Standards for Training Packages Edits to clarify intent of Performance Criteria 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

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Assessment Requirements for BSBINN601 Lead and manage organisational change

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:

- 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 managers
- 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.

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 change management process or cycle and strategies for communicating and embedding change
- explain how organisational behaviour and the external environment can impact on change strategies
- describe the components of a change management project plan
- list potential barriers to change and explain possible strategies to address barriers.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation and include access to:

- workplace documentation and resources
- office equipment, materials and software packages
- case studies or, where available, 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

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BSBINN801 Lead innovative thinking and practice

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 generate, lead and sustain innovative organisational thinking and practice.

It 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, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Creativity and Innovation – Innovation

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 Generate innovative thinking and creativity	1.1 Research and use a range of techniques and tools to generate new ideas and thinking 1.2 Research and analyse trends shaping organisation's current and future thinking and practice 1.3 Introduce and promote creative thinking techniques to foster personal and team innovation 1.4 Evaluate overall context for individual and collective

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ELEMENT	PERFORMANCE CRITERIA
	innovative thinking and creativity 1.5 Research and analyse specific conditions for innovation and issues that impact on individual and collective innovative thinking and creativity 1.6 Research and review innovation drivers and enablers
2 Lead innovative practices	2.1 Develop personal leadership style to model positive innovative thinking and practice 2.2 Review, challenge and refine own style and practice in relation to modelling and supporting innovation 2.3 Assess and determine the requirements to promote sustainable innovative activity for the operational context and people involved 2.4 Devise and implement most appropriate means to promote knowledge transfer 2.5 Identify, evaluate and manage risks associated with innovation within an organisation
3 Generate and support a culture of innovation	3.1 Introduce and promote innovative practices, processes, products or services appropriate to audience and organisational requirements 3.2 Establish ways to capture, communicate and share innovative ideas and practices 3.3 Initiate and foster communication, consultation and team development approaches that support innovation 3.4 Identify, assess and provide adequate resources for innovation to occur 3.5 Develop and apply strategies to foster a workplace culture capable of encouraging innovation 3.6 Establish mechanisms at system and process level that can support innovation
4 Sustain innovative thinking and practice	4.1 Develop strategies to make innovation an integral part of organisational activity 4.2 Develop and monitor processes to ensure ongoing awareness of individual and collective contributions to innovative thinking and practice 4.3 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

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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	2.1, 2.2, 4.4	• Evaluates and reflects on personal effectiveness to develop strategies to enhance own performance
Reading	1.1, 1.2, 1.5, 1.6	• Identifies, analyses, interprets and evaluates visual and textual information from a range of sources to identify innovation strategies, practices and trends
Writing	1.1, 1.2, 1.5, 1.6, 3.2	• 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
Oral Communication	1.3, 3.2, 3.3, 3.5	• 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
Numeracy	1.1, 1.2, 1.5, 1.6, 3.2	• Interprets, analyses and presents numeric/financial information in complex documents
Navigate the world of work	2.1, 2.2, 2.3, 2.5, 3.1, 3.5, 4.1	• Understands how own role meshes with others and contributes to broader work goals • Leads in the development of strategies to integrate innovative practices into the organisation
Interact with others	1.3, 3.2, 3.3, 3.5	• 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
Get the work done	1.1,1.2, 1.3-1.6, 2.3-2.5, 3.2-3.6, 4.1-4.4	• 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

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		• Uses formal analytical and lateral thinking techniques to identify issues, generate and evaluate possible solutions, and select most appropriate option

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINN801 Lead innovative thinking and practice	BSBINN801A Lead innovative thinking and 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBINN801 Lead innovative thinking and practice

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:

- use various techniques and tools to stimulate creative or innovative thinking
- research, review and critically analyse trends in thinking and emerging practices as they relate to an organisation's current thinking and practices
- develop own capacity to lead innovative thinking and practice in an organisational context
- complete a workplace project or case study to demonstrate a comprehensive understanding and application of key concepts, current theories and processes for introducing, communicating, promoting, supporting and sustaining innovative thinking and practices in an organisational context.

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:

- compare and contrast current and past theories and thinking about innovation
- explain how theory and thinking on innovation and creativity can contribute to applied practice
- discuss the impact of leadership style on innovation in organisations, including how specific approaches may encourage or inhibit innovation
- discuss the relevance of organisational and industry context on innovation
- analyse the internal and external conditions or factors that impact on organisational innovation
- outline strategies for identifying, assessing and managing risks associated with innovation
- provide examples of innovation drivers in an organisation
- provide examples of innovation enablers in an organisation

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- list and describe mechanisms at system or process level that can support innovative practices
- discuss typical challenges and barriers to innovation within an organisation and ways of overcoming these challenges and barriers.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the creativity and innovation field of work and include access to:

- workplace documentation and resources
- office equipment and materials
- case studies or, where available, 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

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BSBINT301 Apply knowledge of the international trade environment to complete work

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 complete work in an international trade context based on a demonstrated knowledge of the international trade environment.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge accessed from a variety of sources both internal and external to the workplace.

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

Unit Sector

Business Development – International Business

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. Identify international and Australian regulatory bodies and their roles and responsibilities	1.1 Assess personal knowledge of relevant international and Australian regulatory bodies, their roles and responsibilities, and the required skills in applying this knowledge, to determine currency and adequacy 1.2 Identify knowledge and skill gaps

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Seek assistance as required to identify relevant bodies, their roles and responsibilities and their impact on own work 1.4 Undertake learning to ensure currency and adequacy of knowledge and skills concerning regulatory bodies, their roles and responsibilities and their impact on own work
2. Identify significant trade routes and modes of transport	2.1 Assess personal knowledge of significant trade routes and modes of transport and the required skills in applying this knowledge, to determine currency and adequacy 2.2 Identify knowledge and skills gaps 2.3 Seek assistance as required to identify significant trade routes and modes of transport, and their impact on own work 2.4 Undertake learning to ensure currency and adequacy of knowledge and skills concerning significant trade routes and modes of transport, and their impact on own work
3. Investigate available sources of information on international trade	3.1 Determine specific needs for information 3.2 Access organisation's resources to meet information requirements 3.3 Use information to address specific work needs and to identify further information requirements 3.4 Access external information resources to meet further information requirements

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, 1.2, 1.4, 2.1, 2.2, 2.4	• Assesses personal knowledge and identifies opportunities to update knowledge and skills to improve own work practices
Reading	1.1, 1.3, 1.4, 2.1, 2.3, 2.4, 3.1-3.4	• Identifies and comprehends relevant information from a range of texts to aid in determining needs and requirements
Writing	1.1, 1.4, 2.1, 2.4, 3.3	• Documents results of research and learning activities for future reference

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Oral Communication	1.3, 1.4, 2.3, 2.4	• Uses appropriate vocabulary and non-verbal features during learning activities • Uses listening and questioning skills to seek and clarify information
Navigate the world of work	1.1, 1.3, 1.4	• Builds knowledge of regulatory framework within own work context and to achieve desired outcomes
Interact with others	1.3, 1.4, 2.3, 2.4	• Interacts effectively when seeking assistance and advice from relevant personnel and industry bodies • Collaborates with other more experienced work colleagues to supplement knowledge and achieve outcomes
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.1-3.4	• Plans, organises and implements tasks required to achieve required outcomes • Uses analytical skills to evaluate knowledge or skill gaps and decide on appropriate methods to address these gaps

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT301 Apply knowledge of the international trade environment to complete work	BSBINT301B Apply knowledge of the international trade environment to complete work	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

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Assessment Requirements for BSBINT301 Apply knowledge of the international trade environment to complete work

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:

- determine information needs as assigned by senior members of the organisation using a variety of internal and external sources to gather information
- submit examples of completed tasks that apply knowledge of international and Australian regulatory bodies, their roles and responsibilities and significant trade routes and modes of transport
- carry out self-assessment to address gaps in knowledge or skills.

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 significant trade routes and modes of transport
- outline relevant international and Australian regulatory bodies, their roles and responsibilities
- explain the historical and contemporary context of trade, particularly as this affects Australian trade
- outline internal and external information sources related to regulatory bodies, trade routes and transport modes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources

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- relevant documentation
- case studies or scenarios relating to international trade.

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

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BSBINT302 Apply knowledge of legislation relevant to international trade to complete work

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 complete work in the context of legislation relevant to international trade.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of legislation relevant to international trade.

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

Unit Sector

Business Development – International Business

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 Identify legislative requirements	1.1 Seek assistance to identify current information about range of legislation, regulations and codes of practice relating to own work 1.2 Access organisation's procedures and practices to facilitate compliance with relevant legislation and clarify with others in the workplace as required 1.3 Seek assistance in applying relevant legislation to own work

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ELEMENT	PERFORMANCE CRITERIA
2 Comply with legislative requirements	2.1 Clarify compliance requirements with others within the workplace to confirm understanding and ensure consistency of application 2.2 Seek assistance as required to meet compliance requirements while completing assigned tasks 2.3 Check completed assigned tasks with others in the workplace to ensure compliance with legislative requirements
3 Report possible incidents of non-compliance	3.1 Determine and clarify workplace procedures for reporting incidents of non-compliance as required 3.2 Report possible incidents of non-compliance in line with workplace procedures 3.3 Use incidents of non-compliance and possible implications of non-compliance to guide own work practices

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, 2.3, 3.1	• Identifies and analyses information in organisational and legislative documents
Writing	3.2	• Prepares workplace documents in accordance with organisational formats
Oral Communication	1.1-1.3, 2.1-2.3, 3.1, 3.2	• Participates in spoken exchanges using appropriate vocabulary and non-verbal features to seek assistance • Uses listening and questioning skills to seek and clarify information
Navigate the world of work	1.2, 1.3, 2.1-2.3, 3.3	• Recognises and applies knowledge of regulatory compliance framework and organisational requirements relating to own work
Interact with others	1.1, 1.3, 2.1-2.3, 3.1, 3.2	• Selects the appropriate form and mode of communication when gathering, clarifying and providing information taking into account purpose and audience • Recognises limitations of own knowledge and skills and collaborates with more experienced work

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		colleagues to achieve outcomes
Get the work done	1.2, 2.2, 3.1-3.3	• Plans, organises and implements tasks required to achieve outcomes according to organisational requirements, seeking assistance as necessary • Uses problem-solving skills to analyse and evaluate potential issues and decide on appropriate actions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT302 Apply knowledge of legislation relevant to international trade to complete work	BSBINT302B Apply knowledge of legislation relevant to international trade to complete work	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

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Assessment Requirements for BSBINT302 Apply knowledge of legislation relevant to international trade to complete work

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:

- maintain compliance with regulatory and policy requirements
- report possible incidents of non-compliance
- seek assistance to clarify compliance 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:

- identify and provide an overview of key provisions of relevant legislation, codes of practice and national standards that affect international trade
- outline organisational policies and procedures relating to compliance
- explain the implications of non-compliance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources
- relevant documentation
- case studies or scenarios relating to international trade.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBINT303 Organise the importing and exporting of goods

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 general assistance to senior staff organising importing and exporting of goods. Work may be for an external client or for the organisation in which the individual is employed.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of requirements for importing and exporting goods.

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

Unit Sector

Business Development – International Business

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 Follow organisational systems and processes for organising importation and exportation of goods	1.1 Detail goods to be imported or exported according to characteristics 1.2 Identify and access regulations and permits relating to international movement of specific goods with assistance of manager, supervisor or more senior personnel 1.3 Research and document required processes and trade routes to import or export specific goods as assigned by and under direction

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ELEMENT	PERFORMANCE CRITERIA
	of manager, supervisor or more senior personnel 1.4 Seek assistance as required to research import or export requirements
2 Contribute to cost calculations	2.1 Discuss and record components of costs of importing or exporting specific goods with supervisor or manager 2.2 Make a determination of components of costs 2.3 Seek assistance as required in assigned tasks related to calculating costs for international movement of goods 2.4 Document costs for international movement of goods in accordance with workplace procedures 2.5 Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager 2.6 Finalise and recheck any revisions to calculations by self and supervisor or manager
3 Assist in completing required documentation	3.1 Complete and collate required documentation for international movement of goods 3.2 Seek assistance as required in completing and checking documentation 3.3 Check required documents and forward for further checking by supervisor or manager 3.4 Finalise documents and submit or lodge with relevant parties 3.5 Identify and file copies of required documents in accordance with workplace procedures
4 Communicate with carriers	4.1 Identify customs licensed places and transportation services to be used in the international movement of goods with assistance of supervisor, manager or more senior personnel 4.2 Ensure communication facilitates arrangements to move goods within required timelines 4.3 Identify problems and take actions as required to facilitate resolution 4.4 Follow through arrangements for transportation of goods including arrangements with overseas representatives of carriers to finalisation, including arrival of goods at intended destination and settlement effected to complete the contract 4.5 Seek assistance as required in communicating with carriers

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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, 2.4-2.6, 3.1, 3.3, 3.5, 4.1	• Comprehends and applies relevant information in organisational and legislative documents
Writing	1.1-1.4, 2.1-2.4, 2.6, 3.1, 3.2, 3.4, 4.2, 4.5	• Uses clear simple vocabulary, everyday grammatical structures and workplace conventions to complete and update documentation
Oral Communication	1.2-1.4, 2.1, 2.3, 3.2, 4.1, 4.2, 4.5	• Uses appropriate vocabulary, including technical language, in discussions directly relevant to own role • Elicits the views and opinions of others by listening and questioning
Numeracy	2.1-2.6, 4.2	• Interprets relevant mathematical data that may be embedded in tables of fees and charges • Performs calculations required to determine costs and timeframes
Navigate the world of work	1.2, 2.4, 3.5	• Applies knowledge of regulatory compliance frameworks and organisational procedures to achieve expectations
Interact with others	1.2-1.4, 2.1-2.3, 2.5, 2.6, 3.2-3.4, 4.1, 4.2, 4.4, 4.5	• Selects the appropriate form and mode of communication when gathering, confirming and providing information, taking into account purpose and audience • Recognises limitations of own knowledge and skills and collaborates with more experienced work colleagues to supplement knowledge and achieve outcomes
Get the work done	1.1-1.3, 2.2, 2.3, 3.1, 4.2, 4.3, 4.4	• Plans, organises and implements tasks required to achieve required outcomes, including making arrangements with external persons • Recognises and responds to predictable routine problems related to role in immediate work context

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINT303 Organise the importing and exporting of goods	BSBINT303B Organise the importing and exporting of goods	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

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Assessment Requirements for BSBINT303 Organise the importing and exporting of goods

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 legislative and organisational guidelines for importing and exporting goods
- communicate effectively with managerial and carrier personnel
- accurately calculate the cost of importing or exporting specific goods
- produce accurate 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:

- outline legislation, codes of practice and national standards relevant to business operations in an international trade context
- list international and Australian regulatory bodies and their roles and responsibilities
- identify organisational policies and procedures relating to business operations in an international trade context
- briefly outline the process used in the organisation for the importing or exporting of goods
- outline significant trade routes and modes of transport used by the organisation
- explain the penalties for incorrect customs declarations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources
- examples of importing and exporting documents

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- 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

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BSBINT304 Assist in the international transfer of 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 provide general assistance to senior staff in the operational aspects of transferring services internationally. Work may be for an external client or for the organisation in which the individual is employed.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of international services.

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

Unit Sector

Business Development – International Business

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 Clarify services to be transferred internationally	1.1 Determine services to be transferred internationally and clarify with supervisor or manager 1.2 Determine own role in transfer of services internationally from job description, instructions provided and discussion with supervisor or manager
2 Contribute to implementing processes	2.1 Clarify and document preferred and required processes for

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ELEMENT	PERFORMANCE CRITERIA
for transfer of services	transfer of services with supervisor or manager 2.2 Obtain required permit application forms for transfer of services internationally 2.3 Complete permit application forms with assistance as required 2.4 Complete any other documents required for transfer arrangements with assistance as required and as assigned 2.5 Check documents for accuracy and completeness
3 Contribute to cost calculations	3.1 Discuss and record cost components for international transfer of services with supervisor or manager 3.2 Make a determination of components of costs 3.3 Seek assistance as required in assigned tasks related to calculating costs for international transfer of services 3.4 Document costs for international transfer of services in accordance with workplace procedures 3.5 Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager 3.6 Finalise and recheck any revisions to calculations made by self and supervisor or manager
4 Assist in completing required documentation	4.1 Complete and collate required documentation completed by self and others in the workplace 4.2 Seek assistance as required in completing and checking documentation required for international transfer of services 4.3 Check required documents by self and forward for checking by supervisor or manager 4.4 Finalise, submit or lodge documents with relevant parties 4.5 Identify and file required copies of documents according to workplace 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 Criteria	Description

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Reading	1.1, 1.2, 2.3-2.5, 3.2, 3.4-3.6, 4.1, 4.3, 4.5	• Identifies and comprehends relevant information from texts relating to the international transfer of services
Writing	1.1, 2.1, 2.3, 2.4, 3.1, 3.2, 3.4-3.6, 4.1, 4.4, 4.5	• Records key information related to the outcomes of the job • Completes documentation according to requirements
Oral Communication	1.1, 1.2, 2.1, 2.3, 2.4, 3.1, 3.3, 4.2	• Participates in a variety of spoken exchanges using appropriate vocabulary and structure • Uses listening and questioning skills to seek clarification
Numeracy	3.1-3.6	• Uses mathematical techniques when carrying out cost calculations for international transfer of services
Navigate the world of work	1.2, 2.2-2.5, 3.2, 3.4, 3.5, 4.1, 4.3-4.5	• Recognises and applies knowledge of regulatory compliance framework and organisational procedures to achieve expectations
Interact with others	1.1, 1.2, 2.1, 2.3, 2.4, 3.1, 3.3, 4.2-4.4	• Selects the appropriate form and mode of communication when gathering, confirming and providing information, taking into account purpose and audience • Seeks clarification and assistance when dealing with services to be transferred internationally
Get the work done	2.2-2.5, 3.1, 3.2, 3.4-3.6, 4.1, 4.4, 4.5	• Uses logically sequenced steps to plan and implement tasks required to achieve outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT304 Assist in the international transfer of services	BSBINT304B Assist in the international transfer of 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

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Assessment Requirements for BSBINT304 Assist in the international transfer of 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:

- assist in arranging the international transfer of services, according to legislative and organisational requirements
- contribute to cost calculations
- assist in the completion of 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:

- outline legislation, codes of practice and national standards relevant to business operations in an international trade context
- list international and Australian regulatory bodies and their roles and responsibilities
- identify organisational policies and procedures relating to business operations in an international trade context
- outline the organisation's processes for arranging transfer of services internationally.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources
- examples of documents relating to the transfer of service
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBINT305 Prepare business documents for the international trade of goods

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 contribute to the preparation of business documents required for trade of goods internationally.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge required for preparation of international trade documentation. Work may be for an external client or for the organisation in which the individual is employed.

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

Unit Sector

Business Development – International Business

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 Identify goods to be transported internationally	1.1 Discuss requirements for transport of goods internationally with supervisor or manager 1.2 Make contributions and suggestions to assist in developing recommended options for arranging international transport of goods based on previous experience

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Record recommendations made for international transport of goods for further investigation
2 Determine method of transport	2.1 Investigate options and requirements for method of transport 2.2 Determine and document suitability and availability of recommended transport options 2.3 Forward details of documented options for method of transport of goods to supervisor or manager for selection and approval 2.4 Seek assistance as required to determine method of transportation
3 Determine packaging and stowage requirements	3.1 Investigate options and requirements for packaging and stowage 3.2 Determine and document suitability and availability of recommended packaging and stowage 3.3 Forward details of documented options for packaging and stowage of goods to supervisor or manager for selection and approval 3.4 Seek assistance as required to determine packaging and stowage of goods
4 Contribute to cost calculations	4.1 Discuss and record components of costs for international transportation of goods with supervisor or manager 4.2 Make a determination of components of costs 4.3 Seek assistance as required in assigned tasks related to calculating costs for international transportation of goods 4.4 Document costs for international transportation of goods in accordance with workplace procedures 4.5 Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager 4.6 Finalise any revisions to calculations and ensure they are rechecked by self and supervisor or manager
5 Complete required documentation	5.1 Complete and collate required documentation by self and others in the workplace 5.2 Seek assistance as required in completing and checking documentation required for international transportation of goods 5.3 Check required documents by self and forward for checking by supervisor or manager 5.4 Finalise and submit documents to be submitted to or lodged

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ELEMENT	PERFORMANCE CRITERIA
	with relevant parties 5.5 Identify and file required copies of documents in accordance with workplace 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 Criteria	Description
Reading	2.1, 2.2, 3.1, 3.2, 4.2, 4.4-4.6, 5.1, 5.3, 5.5	• Interprets and applies information obtained from a range of sources to own work
Writing	1.3, 2.2, 3.2, 4.1, 4.2, 4.4, 4.6, 5.1, 5.4	• Records key information related to the outcomes of the job • Completes documentation according to organisational requirements
Oral Communication	1.1, 1.2, 2.1, 2.4, 3.1, 3.4, 4.1, 4.3, 5.2	• Participates in a variety of spoken exchanges using appropriate vocabulary and structure • Uses questioning and listening skills to clarify and confirm understanding
Numeracy	4.1-4.6	• Uses mathematical techniques to calculate costs for international transfer of services
Navigate the world of work	4.4, 5.5	• Understands and follows organisational procedures relating to own work
Interact with others	1.1, 1.2, 2.3, 2.4, 3.3, 3.4, 4.1, 4.3, 4.6, 5.2, 5.3	• Selects the appropriate form and mode of communication when gathering, confirming and providing information • Recognises limitations of own knowledge and skills and collaborates with more experienced work colleagues to achieve outcomes
Get the work done	1.3, 2.1-2.3, 3.1, 3.2, 4.1, 4.2, 4.4-4.6, 5.1, 5.3-5.5	• Uses logically sequenced steps to plan and implement tasks required to achieve work outcomes • Uses analytical skills to make decisions directly related to role, seeking assistance when required

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINT301 Apply knowledge of the international trade environment to complete work	BSBINT301B Apply knowledge of the international trade environment to complete work	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

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Assessment Requirements for BSBINT305 Prepare business documents for the international trade of goods

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:

- assist in arranging the international transportation of goods according to legislative and organisational requirements
- assist in determining method and costs of transportation, including packaging and stowage requirements
- ensure accurate and timely completion of required documentation for submission or lodgement with relevant parties.

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 legislation, codes of practice and national standards relevant to international transportation of goods
- list international and Australian regulatory bodies and their roles and responsibilities
- identify organisational policies and procedures relating to international transportation of goods
- outline significant trade routes and modes of transport relevant to the work role in assisting with operational aspects of international transportation of goods
- list the penalties for incorrect customs declarations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

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- office equipment and resources
- documentation relating to the transfer of goods and services
- 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

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BSBINT306 Apply knowledge of international finance and insurance to complete work requirements

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 knowledge of international finance and insurance to complete work requirements. Work may be for an external client or for the organisation in which the individual is employed.

It applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of international finance and insurance.

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

Unit Sector

Business Development – International Business

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 Maintain currency of knowledge of finance and insurance	1.1 Assess personal knowledge and skills in the area of finance and insurance against needs and available standards to determine currency and adequacy of own knowledge and skills 1.2 Identify the various insurance types available and their application for international trade 1.3 Identify knowledge and skill gaps

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Undertake development to ensure currency and adequacy of knowledge and skills in applying finance and insurance to own work
2 Identify information requirements and access available information	2.1 Determine specific needs for information 2.2 Access enterprise resources to obtain available information 2.3 Check and access information from available resources against specific needs 2.4 Access further information if required
3 Interpret and analyse available information	3.1 Collect and collate available information for analysis 3.2 Interpret, analyse and process available information to obtain required information 3.3 Seek assistance of enterprise personnel and relevant third parties if required, to interpret, analyse and synthesise required information 3.4 Check outputs of analysis process against required information and specific needs 3.5 Undertake further research and analysis to meet specific needs if required
4 Apply knowledge to specific international trading operations	4.1 Use outcomes of research and analysis to facilitate international trading operations in compliance with relevant legislation (Australian and international), trade conventions and agreements, and international financing arrangements 4.2 Complete documentation according to enterprise standards, instructions supplied with document or form, and directions obtained from originator of form or document 4.3 Check documentation for accuracy and correctness by self and manager or supervisor 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	Performance Criteria	Description

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Learning	1.1, 1.3, 1.4	• Assesses personal knowledge and skills, and seeks opportunities for professional development to address knowledge and skill gaps
Reading	1.1, 1.2, 1.4, 2.1-2.4, 3.1, 3.2, 3.4, 3.5, 4.1-4.3	• Interprets textual information from a range of sources and identifies relevant and key information
Writing	1.4, 3.2, 3.5, 4.2	• Prepares information which incorporates a synthesis of research • Prepares documents in required format and style
Numeracy	1.1, 1.4	• Interprets numerical information across international finance and insurance contexts
Oral Communication	3.3	• Uses clear vocabulary and listening and questioning techniques to confirm understanding
Navigate the world of work	4.1, 4.2	• Recognises, understands and applies legislative and organisational requirements in undertaking own tasks and achieving expectations
Interact with others	3.3, 4.3	• Seeks to cooperate with others to achieve results in immediate work context
Get the work done	1.1-1.3, 2.1, 3.4, 3.5, 4.2	• Plans and implements routine tasks directly related to completion of own work • Uses analytical skills to evaluate knowledge and skill gaps and decide on further requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT306 Apply knowledge of international finance and insurance to complete work requirements	BSBINT306B Apply knowledge of international finance and insurance to complete work requirements	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBINT306 Apply knowledge of international finance and insurance to complete work requirements

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, analyse and apply information related to finance and insurance to international trading operations
- complete documentation related to finance and insurance of international trading operations.

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 key provisions of relevant Australian and international legislation affecting international fine and insurance requirements
- outline enterprise policies and procedures relating to international trading operations
- explain financial risk and financing options for mitigating risk
- list relevant regulatory authorities, their roles in international trade, and penalties for incorrect documentation and declarations
- outline current political events related to countries with which organisation is trading.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources

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- case studies, or real situations, relating to finance and insurance in international trading operations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBINT401 Research international business 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 available international business opportunities and assess the feasibility of a particular opportunity.

It applies to individuals who wish to investigate business opportunities outside Australia. The activity might be undertaken by an owner/manager of a business or someone with a brief to investigate such opportunities.

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

Unit Sector

Business Development – International Business

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 Identify international business opportunities	1.1 Investigate and identify business opportunities 1.2 Undertake a feasibility study to determine likely business viability 1.3 Identify specialist services and sources of advice where required
2 Identify business skills	2.1 Identify and take into account financial and business skills available in the identified country or countries when researching business opportunities

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Access technical competencies required to take up identified business opportunities in the specific country or countries 2.3 Assess personal skills/attributes and match these against those perceived as necessary for a particular business opportunity 2.4 Identify, assess and document business risks according to resources available

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, 2.1-2.4	• Gathers, interprets and analyses text to identify international business opportunities
Writing	1.1-1.3, 2.1-2.4	• Records and reports key information related to the outcomes of researching international business opportunities
Numeracy	1.1, 1.2, 2.1	• Uses mathematical techniques to ensure accuracy of calculations of fees and charges
Get the work done	1.1-1.3, 2.1-2.4	• Uses logically sequenced steps to plan and implement tasks required to achieve outcomes • Uses analytical techniques to assess skills, competencies and risks associated with opportunities

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINT401 Research international business opportunities	BSBINT401B Research international business opportunities	Updated to meet Standards for Training Packages	Equivalent unit

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Assessment Requirements for BSBINT401 Research international business 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:

- access information from a range of internal and external sources including, where required, specialist services or advice to:
  - identify international opportunities relevant to the organisation's goals, capabilities and capacity in terms of skills and human resources, finances and investment, expected returns, relationship with or knowledge of other countries
  - evaluate the viability of the opportunities in terms of business risks, finances, physical resources, market competition, human resources and skills, timing considerations and relevant legislation, regulations standards and codes of practice
- document outcomes of research.

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 internal and external sources of information relevant to identifying and evaluating the organisation's international business opportunities
- outline key provisions of relevant legislation, regulations, standards and codes of practice
- describe cultural aspects relevant to target markets
- explain common measures that can be used to assess the viability or feasibility of business opportunities
- explain principles of risk management relevant to the business opportunities.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development - international business field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBINT405 Apply knowledge of import and export international conventions, laws and finance

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 maintain currency of knowledge and skills on international conventions, laws and finance to apply these to import and export responsibilities.

It applies to individuals with a broad knowledge of international trade who need to maintain relevant knowledge and skills by recognising the limits of their own experience and knowledge, and organise learning to collect, analyse, apply and review information required for specific complex tasks or projects.

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

Unit Sector

Business Development – International Business

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 Maintain currency of knowledge and skills	1.1 Assess personal knowledge of relevant international conventions, laws and finance and the required skills in applying this knowledge to determine currency and adequacy 1.2 Identify skills and knowledge gaps 1.3 Undertake learning to ensure currency and adequacy of knowledge

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ELEMENT	PERFORMANCE CRITERIA
	and skills in applying international conventions, laws and finance to own work
2 Identify information requirements and access available information	2.1 Determine specific needs for information 2.2 Access organisation's resources to meet information requirements 2.3 Use information to address specific work needs and to identify further information requirements 2.4 Access external information resources to meet further information requirements
3 Interpret, analyse and apply available information	3.1 Collect and collate available information for analysis 3.2 Interpret, analyse and process available information to obtain required knowledge 3.3 Seek assistance of specialist experts, if required, to interpret, analyse and synthesise required information 3.4 Use information and knowledge to facilitate import and export of goods in compliance with relevant Australian and overseas legislation, trade conventions and agreements, and international financing arrangements
4 Review research and analysis process	4.1 Use and review information and knowledge to facilitate import and export of goods for effectiveness 4.2 Document review findings for future use in import and export of goods 4.3 Identify skill and knowledge gaps and undertake further learning

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, 1.2, 1.3, 4.3	• Extends own professional development to ensure adequacy and currency of skills and knowledge
Reading	1.1-1.3, 2.2-2.4, 3.1, 3.2, 3.4, 4.1, 4.3	• Gathers, interprets and analyses complex textual information to contextualise it to requirements
Writing	1.2, 1.3, 2.1, 2.3,	• Takes notes for personal use

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	3.1, 3.2, 3.4, 4.1, 4.2	• Uses clear and specialised language to accurately document requirements and outcomes
Oral Communication	3.3	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits the views and opinions of others by listening and questioning
Navigate the world of work	1.1, 1.3, 2.2, 2.3 2.4, 3.4	• Appreciates the implications of legal and regulatory responsibilities related to own work
Interact with others	3.3	• Seeks guidance and expertise of others when required
Get the work done	1.1-1.3, 2.2, 2.4, 3.1, 3.2, 4.2	• Uses logically sequenced steps to plan and implement tasks related to own work • 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 review processes to reflect on ways practices may be improved in the future

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT405 Apply knowledge of import and export international conventions, laws and finance	BSBINT405B Apply knowledge of import and export international conventions, laws and finance	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

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Assessment Requirements for BSBINT405 Apply knowledge of import and export international conventions, laws and finance

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 ongoing learning needs in relation to international conventions, laws and financial matters that impact on import/export responsibilities
- identify processes or opportunities to gain the necessary information
- use and manage opportunities to gain the necessary information.

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 the types of learning opportunities available in the organisation and how to access them
- explain the key provisions of legislation, codes of practice, standards or conventions relevant to international transactions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- resource collections
- office equipment and resources
- relevant workplace documents.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBINT407 Prepare business advice on export Free-on-Board Value

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 accurately determine and prepare business advice on export entry or declaration Free-on-Board (FOB) Value on goods exported from Australia.

It applies to individuals with a broad knowledge of international trade who contribute well-developed skills to preparing business advice for a client on the FOB value field on an export entry declaration.

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

Unit Sector

Business Development – International Business

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 Identify relevant export invoice	1.1 Identify the buyer and seller 1.2 Identify the relevant contract and export invoice 1.3 Consider definitions and differences in definitions of FOB value in determining FOB value of goods being exported from Australia 1.4 Identify the International Commercial Terms (INCOTERMS)

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ELEMENT	PERFORMANCE CRITERIA
	relevant to contract 1.5 Identify the party to the sales contract responsible for Australian export formalities from INCOTERMS
2 Interpret invoice terms and currency	2.1 Identify the components that constitute the price, in Australian or foreign currency, paid or payable and appearing on the invoice 2.2 Identify INCOTERMS relevant to the invoice 2.3 Identify currency used
3 Adjust invoice price	3.1 Identify adjustments 3.2 Make additions and subtractions to the price
4 Calculate export FOB value, applying currency conversion principles	4.1 Apportion costs against exported goods using organisational requirements/policies/procedures 4.2 Apply appropriate rate of exchange
5 Finalise business advice on export FOB value	5.1 Complete advice on FOB value field on export entry or declaration 5.2 Check calculations for accuracy and verify as required 5.3 Retain and file completed documentation with relevant personnel in the enterprise 5.4 Pass relevant business advice to client

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	1.1-1.5, 2.1-2.3, 3.1, 4.1, 5.1, 5.2	• Identifies relevant information in documents • Interprets and comprehends requirements from organisational documents
Writing	3.2, 4.1, 4.2, 5.1, 5.2, 5.4	• Completes documentation according to specific organisational requirements
Oral Communication	5.4	• Uses appropriate language and features in spoken exchanges with clients • Elicits views and opinions of others by listening and

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		questioning
Numeracy	1.2-1.4, 2.1-2.3, 3.1, 3.2, 4.1, 4.2, 5.2	• Uses mathematical information from invoices and performs calculations to convert currencies and determine FOB values
Navigate the world of work	4.1	• Applies organisational policies and procedures to daily work
Interact with others	5.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.5, 2.1-2.3, 5.3	• Uses logically sequenced steps to plan and implement own work

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.

Organisational requirements/policies/ procedures refer to:	• factorisation where costs are proportioned over a line value (each line of the invoice for which there is a separate classification) • other relevant requirements outlined in policies and procedures for calculating FOB

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT407 Prepare business advice on export Free-on-Board Value	BSBINT407B Prepare business advice on export Free on Board Value	Updated to meet Standards for Training Packages	Equivalent unit

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Assessment Requirements for BSBINT407 Prepare business advice on export Free-on-Board Value

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 a range of export documentation to determine export Free-on-Board (FOB) value as required for goods exported from Australia
- accurately document export FOB calculations and advice as required by client.

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 importance of the International Commercial Terms to international trade
- explain the differences in definitions of FOB values
- identify legislation, codes of practice or standards relevant to exporting of goods
- explain relevant organisational policies and procedures relating to exporting
- explain the penalties that apply to goods where the export FOB value is incorrect.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources
- relevant workplace documents
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBINT408 Prepare business advice on the taxes and duties for international trade transactions

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 the applicability of the relevant taxes and duties for international trade transactions, and to prepare business advice based on the assessments and calculations undertaken.

It applies to individuals with a broad knowledge of taxes and duties who contribute well-developed skills and knowledge to prepare business advice for a client. This unit addresses the application of relevant legislation, determinations, decisions and guidelines pertaining to the Australian Taxation System and Australian Customs regulations to assess the applicability of the GST, Australian Harmonised Export Commodity Codes for tax and duty related to export transactions, and to accurately calculate relevant taxes and duty and to prepare appropriate business advice for a client.

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

Unit Sector

Business Development – International Business

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 Assess applicability of relevant taxes and duties to international trade	1.1 Research the applicability of relevant taxes and duty to international trade transactions

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ELEMENT	PERFORMANCE CRITERIA
transactions	1.2 Research allowable exemptions and specialised schemes and legislations relating to international taxes or applicability to enterprise operations and specific international trade transactions 1.3 Apply allowable exemptions to trade transactions 1.4 Check accuracy of assessments
2 Calculate taxes and duty	2.1 Identify components of international trade transactions to be included in calculations 2.2 Calculate taxes and duty on international trade transactions 2.3 Check accuracy of calculations
3 Prepare business advice on applicable taxes and duty	3.1 Prepare results of calculations and business advice in required format 3.2 Check calculations for accuracy, and seek and obtain verification from relevant personnel as required 3.3 Pass completed business advice to client and other relevant personnel 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	Performance Criteria	Description
Reading	1.1-1.4, 2.1, 3.1, 3.2	• Identifies and analyses relevant information in complex texts so advice can be provided on taxes and duties
Writing	1.1-1.3, 2.2, 3.1, 3.2	• Completes documentation according to specific requirements
Oral Communication	3.2, 3.3	• Uses appropriate language and features in spoken exchanges with clients • Elicits views and opinions of others by listening and questioning
Numeracy	1.3, 1.4, 2.2, 2.3, 3.1-3.3	• Uses mathematical skills to calculate trade transactions and taxes, and to check figures for accuracy
Navigate the world of work	1.2	• Recognises relevant international trade requirements in the context of own work

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Interact with others	3.2, 3.3	• Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts • Seeks assistance from more experienced work colleagues
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3	• Uses logically sequenced steps to plan and implement own work

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT408 Prepare business advice on the taxes and duties for international trade transactions	BSBINT408B Prepare business advice on the taxes and duties for international trade transactions	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

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Assessment Requirements for BSBINT408 Prepare business advice on the taxes and duties for international trade transactions

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:

- accurately calculate at least TWO examples of good and services tax (GST), other taxes and duty payable across international trade transactions
- provide at least TWO examples of situations where an assessment of allowable exemptions and/or incentives have been made including:
- keep records of relevant documentation used in the workplace
- provide examples of completed business advice.

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 legislation, codes of practice and standards relevant to taxes and duties for international trade
- explain allowable exemptions and specialised schemes affecting taxes/duty payable on imports/exports
- summarise exclusions allowable for GST, related taxes and duty
- summarise organisational policies and procedures relating to import, export and customs brokerage/freight forwarding activity
- explain the penalties for incorrect calculation of taxes/duty payable.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

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- workplace documentation
- information about applicable taxes and exemptions
- office equipment and resources
- 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

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BSBINT409 Plan for international trade

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 effectively plan for the international trade of goods.

It applies to individuals with the skills and knowledge to evaluate options when planning for the international trade of goods. The planning activity will usually be in the context of providing a preliminary quotation, a quotation, supplementary advice on a quotation, or when evaluating a freight contract received from a buyer or seller.

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

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 Evaluate the most appropriate transport method, route and protection/security options according to cargo and delivery requirements	1.1 Ascertain business context of cargo movement 1.2 Examine factors to be considered in route/mode selection 1.3 Evaluate conditions and risks of different routes in relation to delivery requirements 1.4 Utilise resources that provide information on the current service status of particular transport routes
2 Review shipping and airfreight services available for transporting cargo	2.1 Identify airlines and air cargo services operating in and out of Australia 2.2 Compare configuration and carrying capacity of different types of aircraft

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Identify shipping services and types of ocean vessels operating in and out of Australia 2.4 Compare different types of shipping services 2.5 Compare configurations and carrying capacities of different types of ocean vessels
3 Evaluate packing, marking and stowage requirements for a variety of cargo	3.1 Analyse and prepare protection, presentation and preservation requirements 3.2 Analyse range of containers available for international cargo and evaluate for use 3.3 Evaluate marking requirements and prepare correct marking advice 3.4 Identify risk factors in relation to packing and storing of goods for transportation, and select appropriate options
4 Calculate international freight and other shipment costs	4.1 Examine and apply types of rates, volume-to-weight ratio factors, volume rules including rounding off and allowable projections, principles and methods of rating cargo for international carriage by sea 4.2 Take into account, variations in calculating shipping charges caused by surcharges and other variants 4.3 Calculate and compare costs of shipping a variety of goods by several types of ocean service 4.4 Examine and apply types of rates, volume-to-weight ratio factors, volume rules including rounding off, principles and methods of rating cargo for international carriage by air 4.5 Explain variations in calculating airfreight charges caused by the applicability of TACT rates, fuel surcharges, other variants, and exchange rates 4.6 Calculate and compare costs of shipping a variety of goods by different air cargo services 4.7 Investigate and communicate postal and courier freight rates and size/weight factors and limitations 4.8 Investigate and communicate rates and costs associated with chartering vessels and aircraft 4.9 Investigate and communicate rating principles and methods used in domestic, sea, road, rail and air transport 4.10 Investigate all standard and extraordinary ancillary shipment costs on a door-to-door basis applicable in each mode 4.11 Investigate and communicate the total cost concept and other

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ELEMENT	PERFORMANCE CRITERIA
	factors that may determine whether cargo is carried by air or sea, or a combination of both (multimodal transport)
5 Identify cargo insurance and claim requirements for goods	5.1 Evaluate the need for cargo insurance 5.2 Investigate the standard types of cover arrangements used by underwriters 5.3 Identify documents to be lodged with carriers, forwarders, insurance underwriters and customs in cargo loss or damage situations and complete for a hypothetical situation

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, 2.1-2.5, 3.1-3.4, 4.1, 4.2, 4.4, 4.7, 4.8, 4.10, 4.11, 5.1-5.3	• Interprets textual information from a range of sources to determine how content may be applied when planning for international trade
Writing	3.1, 3.3, 4.7-4.9, 4.11, 5.3	• Produces documentation for particular purposes using clear and specific language and required structure • Completes forms and other documents required for international trade
Oral Communication	4.5, 4.7-4.9, 4.11	• Explains complex information using language appropriate to audience and environment
Numeracy	1.1, 1.2, 2.2, 2.5, 4.1-4.11, 5.1	• Analyses numerical information and calculates costs associated with international trade of goods
Interact with others	4.5, 4.7-4.9, 4.11	• Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.4, 4.1-4.11, 5.1-5.3	• Uses logically sequenced steps to plan and coordinate tasks required to achieve outcomes • Uses problem-solving processes in complex situations, gathering and evaluating relevant information before deciding on transport options

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBINT409 Plan for international trade	BSBINT409B Plan for international trade	Updated to meet Standards for Training Packages	Equivalent unit

Links

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Assessment Requirements for BSBINT409 Plan for international trade

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 transport modes, routes and securing options
- demonstrate successful preparation for international transport for different types of general cargo
- document completed quotations, supplementary quotations, budget or expressions of interest prepared for an external client or own workplace.

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 legislation, codes of practice and standards relevant to international trade
- outline organisational policies and procedures relating to international trade
- outline risk factors in relation to packing and storing of goods for transportation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment and resources
- relevant workplace documents
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBIPR301 Comply with organisational requirements for protection and use of intellectual property

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 assist with the protection and lawful use of an organisation's intellectual property and to avoid intellectual property infringement. It focuses on supporting the maintenance of an organisation's policies and procedures for the protection of intellectual property and avoidance of intellectual property infringement.

It applies to individuals who operate in a broad range of work roles and contexts and whose role may include assisting the organisation to comply with intellectual property requirements for the protection and use of intellectual property.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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. Identify organisational expectations for complying with intellectual property requirements	1.1 Identify the various types of existing and potential intellectual property within the organisation 1.2 Identify and access the organisation's intellectual property policies, procedures and information 1.3 Identify own role in protecting the organisation's intellectual

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ELEMENT	PERFORMANCE CRITERIA
	property, using intellectual property and avoiding intellectual property infringement 1.4 Provide information and advice to relevant internal and external stakeholders about how the organisation's intellectual property policies and procedures operate, within limits of job role
2. Support policies and procedures for the protection and use of intellectual property	2.1 Assist with the development and/or implementation of policies and procedures for the protection and use of the organisation's intellectual property according to the type of protection required 2.2 Assist with the development and/or implementation of policies and procedures to prevent infringement of others' intellectual property 2.3 Assist in the maintenance of intellectual property policies and procedures 2.4 Contribute to the identification of potential problems and opportunities for improvement in the operation of the intellectual property policies and procedures and make recommendations to appropriate personnel for action
3. Contribute to recommendations about non-compliance issues with intellectual property requirements	3.1 Contribute to the identification of any potential non-compliance or intellectual property infringement issues, either internally or externally 3.2 Contribute to recommendations to appropriate personnel about actions to overcome non-compliance issues 3.3 Alert appropriate personnel to areas of potential intellectual property infringement or risk

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, 2.1-2.4, 3.1-3.3	• Interprets and comprehends organisational texts related to intellectual property requirements
Writing	1.4, 2.1-2.4, 3.1-3.3	• Records information in accordance with requirements • Develops texts using language appropriate to audience needs

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Oral Communication	1.4, 2.4, 3.1-3.3	• Provides information using language and terminology appropriate to audience • Obtains information from others by listening and questioning
Navigate the world of work	1.3, 1.4, 2.1, 2.2	• Understands and takes responsibility for adhering to legal and regulatory compliance with respect to own work
Interact with others	1.4, 2.1-2.4, 3.1-3.3	• Follows accepted communication practices when seeking or providing advice about intellectual property • Collaborates with others to achieve joint outcomes
Get the work done	1.1, 1.2, 1.4, 2-1-2.4, 3.1-3.3	• Plans and implements a range of tasks directly related to own role, seeking assistance where required • Uses problem solving skills to identify and respond to intellectual property compliance issues

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIPR301 Comply with organisational requirements for protection and use of intellectual property	BSBIPR301A Comply with organisational requirements for protection and use of intellectual property	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

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Assessment Requirements for BSBIPR301 Comply with organisational requirements for protection and use of intellectual property

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 the different types of intellectual property within the organisation
- identify, correctly use and/or update an organisation's intellectual property policies and procedures
- identify the potential of non-compliance issues within an 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:

- describe different types of intellectual property and the key characteristics of each
- outline the relevant organisational policies and procedures in relation to intellectual property
- describe the range of intellectual property residing with the organisation
- describe the relevant legislative requirements as they apply to the job role.

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 – intellectual property field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- 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

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BSBIPR401 Use and respect copyright

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 use and respect copyright. 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.

It applies to people who may be authors, creators or other owners of works covered by copyright. It also applies to employees who have a role in ensuring that their organisation's 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

Regulation, Licensing and Risk – Intellectual Property

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. Identify extent of copyright protection for original works	1.1 Research copyright and its application to original works 1.2 Identify legislative requirements governing copyright 1.3 Determine the copyright owner of original works within or used by the organisation 1.4 Research the rights of the copyright owner, including moral

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ELEMENT	PERFORMANCE CRITERIA
	rights 1.5 Determine whether a copyright notice is required 1.6 Identify sources of information and advice regarding copyright issues and use copyright professionals where required
2. Ensure that copyright protection is effective when using original works	2.1 Identify material within the organisation that may attract copyright 2.2 Identify and review organisation policies and procedures to ensure that own and others' original works are protected against direct or indirect infringement of copyright 2.3 Implement policies and procedures to protect the organisation's copyright, recognising exceptions that allow the legitimate use of own copyright material by others 2.4 Provide advice to relevant personnel about the legal and economic implications of copyright infringement 2.5 Evaluate and make recommendations for the commercialisation potential of copyright material 2.6 Research issues that need to be considered when licensing or selling copyright rights, including the use of copyright collection societies
3. Monitor policies and procedures for use of own copyright materials by other parties	3.1 Monitor policies and procedures to ensure that the organisation's copyright is respected locally and internationally 3.2 Create and maintain documentation in relation to copyright agreements where established 3.3 Implement procedures to limit or deter infringement of organisation's copyright and/or encourage the proper use of the organisation's copyright 3.4 Make recommendations to appropriate personnel when real or potential infringements of organisation's copyright may require further action
4. Monitor policies and procedures for legitimate use of others' copyright materials	4.1 Research when permission is needed to use copyright material belonging to others 4.2 Advise appropriate personnel about restrictions on and licensing requirements for the use of others' copyright material, and implement training if required 4.3 Advise appropriate personnel of legislative exceptions that allow use of copyright material without permission 4.4 Monitor policies and procedures covering organisational use of others' copyright material to ensure it is to the benefit of the

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ELEMENT	PERFORMANCE CRITERIA
	organisation 4.5 Monitor organisational use of others' copyright material to reduce the risk of infringement 4.6 Take action to minimise damage if infringement of others' copyright material occurs

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, 2.1, 2.2, 2.6, 3.1, 4.1, 4.4	• Researches and analyses complex texts, including legislation, to identify relevant information • Monitors and reviews organisational policies and procedures to ensure compliance with legislative requirements
Writing	1.1, 1.3, 1.4, 2.2, 2.4, 2.5, 2.6, 3.2, 3.4, 4.1, 4.3	• Summarises research findings relevant to the organisation • Records and maintains copyright documentation according to organisational and legislative requirements • Reviews and updates organisational policies and procedures to ensure compliance with legislative requirements
Oral Communication	1.3, 1.6, 2.4, 2.5, 3.4, 4.2, 4.3	• Provides advice using language and terminology appropriate to audience • Obtains information from others by listening and questioning
Navigate the world of work	1.2, 2.2, 2.3, 3.1, 3.3, 4.4	• Identifies and complies with legislative requirements associated with own role • Implements, monitors and reviews policies and procedures to ensure organisational compliance with legislative requirements
Interact with others	1.3, 1.6, 2.4, 2.5, 3.4, 4.2, 4.3	• Follows accepted communication practices when seeking or providing advice about intellectual property
Get the work	1.1-1.6, 2.1-2.3, 2.5, 2.6, 3.1-3.4, 4.1,	• Plans, organises and implements tasks needed to ensure compliance with organisational and legislative

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done	4.4-4.6	requirements • Systematically gathers and analyses information to decide on action needed to prevent or address copyright infringements • Uses digital technologies or tools to access and record information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIPR401 Use and respect copyright	BSBIPR401 Use and respect copyright	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

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Assessment Requirements for BSBIPR401 Use and respect copyright

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:

- review and interpret information to determine how copyright applies in the organisation
- implement and review organisational policies and procedures to ensure that own and others' original works are protected
- recommend actions to address risks and infringements
- communicate advice or recommendations about copyright to a range of stakeholders
- identify the need for training on copyright and implement training as appropriate.

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 the legislative framework for copyright and its application to the organisation
- list and describe the types of works that attract copyright
- identify sources of information and advice on copyright
- explain methods to limit or deter unauthorised use of copyright material
- explain direct and indirect infringement
- give examples of action to take if infringement occurs
- give examples of when authorisation for use of copyright material is needed and how to obtain it
- outline different types of licenses and how they apply to the organisation
- outline options for commercialisation of copyright and potential benefits for the organisation.

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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 – intellectual property field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBIPR402 Protect and use new inventions and innovations

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 protect and use new inventions and innovations as the exclusive intellectual property of an organisation or individual. It covers identifying the need for protection of new inventions or innovations, working with specialists to file a successful patent application, monitoring and protecting intellectual property rights, and using the patent for business growth.

It applies to individuals who are actively involved in work concerning the development or ownership of inventive and innovative products. They may work as individual inventors or innovators in a range of industries or organisational contexts, as part of a research and development team within an organisation or be commissioning or employing others to develop new inventions or innovations.

It will give individuals an understanding of patent law and how patents are assigned, to develop an understanding of the actions of patent specialists employed to patent the organisation’s new inventions or innovations.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Identify the need for protection of new inventions and innovations	1.1 Research what constitutes a new invention or innovation in Australia 1.2 Identify legislative requirements governing invention and innovation protection 1.3 Identify inventions and innovations within own organisation that may require protection and identify the type of patent applicable 1.4 Conduct research to determine other inventions or innovations in a specific area of technology 1.5 Research patent information, use patent search and patent search tools, and evaluate their usefulness for the organisation 1.6 Evaluate commercialisation potential of new inventions or innovations to determine if protection is worth pursuing
2 Identify and initiate the process for protection of inventions and innovations	2.1 Identify sources of information and advice on protecting and searching new inventions or innovations 2.2 Identify processes required for filing a successful patent application 2.3 Identify processes for international invention protection 2.4 Evaluate the role of intellectual property professionals in the patent application process 2.5 Participate in a patent search and patent application and provide relevant information to an intellectual property professional for patent search and patent application, if required 2.6 Identify non-registrable forms of a protection strategy and evaluate the benefits of utilising patent alternatives
3 Monitor the market and protect and use new inventions and innovations	3.1 Identify and review organisation policies and procedures to ensure the protection and use of new inventions and innovations 3.2 Identify and establish processes to use own and others' patents for business growth 3.3 Identify appropriate legal measures to protect an invention or innovation against certified infringements, if required, with assistance of appropriate professionals 3.4 Monitor the market for possible patent infringements 3.5 Ensure all employees are aware of the importance to the organisation of protecting new inventions and innovations and implement training if required 3.6 Identify and review organisation policies and procedures to

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ELEMENT	PERFORMANCE CRITERIA
	prevent infringement of others' inventions and innovations

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	1.1-1.6, 2.1-2.6, 3.1-3.6	• Comprehends and interprets workplace documentation • Recognises text within job specifications and work processes related to intellectual property requirements
Writing	1.1-1.6, 2.1-2.6, 3.1-3.6	• Records information and conveys details in accordance with requirements and audience needs • Inputs data and information using appropriate technology
Oral Communication	2.1, 2.4, 2.5, 3.5	• Explains issues and requirements clearly and obtains information from others by listening and questioning
Interact with others	2.5, 3.5	• Selects and applies the appropriate form and mode of communication for a specific purpose and audience • Collaborates with others to ensure shared understanding of requirements
Get the work done	1.1-1.6, 2.1-2.6, 3.1-3.6	• Plans and implements a range of routine and non-routine tasks and effectively achieves required outcomes • Recognises potential problems and uses problem solving strategies to address them • Recognises the potential of new ideas and opportunities • Uses digital technologies and tools to access and record information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBIPR402 Protect and use new inventions and innovations	BSBIPR402A Protect and use new inventions and innovations	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

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Assessment Requirements for BSBIPR402 Protect and use new inventions and innovations

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 any issues with the use, management and protection of new inventions or innovations
- review and amend policies and procedures for the use, management and protection of new inventions or innovations and legitimate use of others' inventions or innovations
- monitor markets to identify infringements and opportunities for the legitimate use of others' inventions or innovations within legislative requirements
- identify the need for training employees where knowledge gaps are evident.

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 what is considered an invention or innovation
- outline registrable and non-registrable forms of protection
- identify patent application guidelines
- outline the relevant legislation concerning patents
- identify sources of information and advice on protection of new inventions or innovations.

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 – intellectual property field of work and include access to:

- relevant legislation, standards and codes
- relevant workplace documentation and resources normally available to a patent applicant

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- explanatory material and guidelines
- 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

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BSBIPR403 Protect and use brands and business identity

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 protect and use brands and other business identities as trademarks. It covers identifying the need for trademark protection, lodging a successful application, monitoring and protecting the trademark, and using the trademark commercially.

It applies to individuals who are involved in work with marketable applications across a variety of work environments.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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 Identify the need for protection of brands and business identity	1.1 Research what constitutes a registrable trademark in Australia 1.2 Identify the legislative requirements governing trademark protection 1.3 Identify other forms of trademark protection 1.4 Identify existing or potential trademarks within organisation or scope

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Explore the benefits, costs and risks of trademark registration and other forms of trademark protection 1.6 Make recommendations to develop and use trademarks with commercialisation potential
2 Identify and initiate application process for trademark protection	2.1 Identify sources of information and advice regarding protection of brands and business identity 2.2 Evaluate the role of intellectual property professionals in the trademark application process 2.3 Search databases of existing registered and pending trademarks and investigate any use of unregistered trademarks to ensure the proposed trademark does not infringe on another party's existing trademark 2.4 Identify processes required for lodging a successful trademark application 2.5 Identify process for international trademark registration 2.6 Participate in a trademark application and provide relevant information to the intellectual property professional for trademark application, if applicable
3 Monitor the market and protect and use trademarks	3.1 Identify and review organisational policies and procedures to protect and use the trademark correctly 3.2 Identify and establish processes to use own and others' trademarks for business growth 3.3 Monitor the market for possible trademark infringements 3.4 Pursue appropriate measures to protect trademarks against infringements, if required, using appropriate professional advice 3.5 Ensure that procedures are followed to maintain the organisation's trademarks including payment of renewal fees as required 3.6 Ensure all employees are aware of the importance to the organisation of the protection and proper use of trademarks, and implement training if required 3.7 Identify and review organisational policies and procedures to prevent infringement of others' trademarks

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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	1.1-1.5, 2.1, 2.3-2.6, 3.1-3.3, 3.7	• Researches and analyses complex texts, including legislation and workplace procedures, to identify relevant information for the organisation • Monitors and reviews organisational policies and procedures to ensure compliance with legislative requirements
Writing	1.6, 2.6, 3.1-3.3, 3.7	• Summarises research findings relevant to the organisation • Records information in accordance with organisational and legislative requirements • Reviews and updates organisational policies and procedures and processes to protect the organisation's intellectual property and to ensure compliance with legislative requirements
Oral Communication	2.6, 3.4, 3.6	• Obtains or provides advice using language and terminology appropriate to audience • Uses listening and questioning skills to obtain or clarify information
Navigate the world of work	1.2, 3.1, 3.5-3.7	• Identifies and complies with legislative requirements associated with own role • Implements, monitors and reviews policies and procedures to ensure organisational compliance with legislative requirements
Interact with others	2.6, 3.4, 3.6	• Follows accepted communication practices when seeking or providing advice trademarks
Get the work done	1.1-1.6, 2.1-2.6, 3.1-3.4, 3.7	• Plans, organises and implements tasks needed to ensure compliance with organisational and legislative requirements • Systematically gathers and analyses information to decide on action needed to prevent or address infringements • Uses digital technologies to access and record information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBIPR403 Protect and use brands and business identity	BSBIPR403A Protect and use brands and business identity	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

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Assessment Requirements for BSBIPR403 Protect and use brands and business identity

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:

- review and interpret information to determine the context and need for brand and identity protection in the organisation
- use various sources to gather information about trademarks, brand protection and the trademark applications process
- participate in the application for a trademark using correct applications process
- establish processes to use own and others' trademarks
- monitor the market and the application of organisation's procedures for possible trademark infringements and recommend actions to address risks and infringements
- communicate information about trademarks and relevant policies and procedures to others
- identify the need for training on trademarks and implement training as appropriate.

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 the legal context for trademarks with reference to relevant Australian and international legislation, treaties and guidelines
- outline organisational policies and procedures relevant to trademarks and brand protection
- outline options for commercialisation of trademarks and potential benefits for the organisation
- identify different ways to protect trademarks
- outline the trademark application processes including definitions of registrable trademarks
- identify various sources of information and advice on trademark protection

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- explain processes that can be used to monitor the market for infringements against own trademarks.

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 – intellectual property field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBIPR404 Protect and use innovative designs

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 protect the appearance or look of manufactured or handmade articles as registered designs. It covers identifying the need for protection, the process of design registration, monitoring and protecting registered designs, and using registered designs commercially.

It applies to individuals and organisations who are involved in creating industrial or fashion designs across a variety of work environments.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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 Identify the need for protection of innovative designs	1.1 Research what constitutes a registrable design and what exclusive rights are obtained through registration 1.2 Identify legislative requirements governing design registration 1.3 Conduct research to determine what has already been published or registered in the area of design 1.4 Assess whether copyright provides protection and determine

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ELEMENT	PERFORMANCE CRITERIA
	adequacy of non-registrable protection 1.5 Identify innovative designs within own organisation with commercial potential 1.6 Evaluate and make recommendations for commercialisation potential of innovative designs
2 Identify and initiate application for protection of innovative designs	2.1 Identify sources of information and advice regarding protection of innovative designs 2.2 Evaluate the role of intellectual property professionals in the registration process 2.3 Identify processes required for the application for registration of a design 2.4 Identify process for international design registration 2.5 Participate in a design registration process and, if applicable, provide relevant information to an intellectual property professional
3 Monitor the market and protect and use registered design	3.1 Identify and review organisational policies and procedures to protect and use the organisation's designs correctly 3.2 Identify and establish processes to use own and others' registered designs for business growth 3.3 Ensure procedures are followed for the organisation to maintain innovative design protection 3.4 Ensure all employees are aware of the importance to the organisation of the protection of designs, and implement training if required 3.5 Monitor the market for possible infringements of registered designs 3.6 Pursue appropriate legal measures to protect designs against infringements, if required, using appropriate professional advice 3.7 Identify and review organisational policies and procedures to ensure all employees respect the work of other designers in fair and open competition

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 1.6, 2.1, 2.2, 2.4, 3.1, 3.3, 3.4, 3.5, 3.7	• Monitors and reviews organisational policies and procedures to ensure compliance with legislative requirements • Researches and analyses complex text including legislation to identify relevant information
Writing	1.1, 1.3, 1.5, 1.6, 2.5, 3.2, 3.4, 3.5, 3.7	• Summarises research findings relevant to the organisation • Records and maintains information and conveys details in accordance with requirements using appropriate terminology and grammatical structure
Oral Communication	2.5, 3.4	• Uses clear language to provide information or explain requirements • Uses listening and questioning techniques to obtain expert advice and clarify understanding
Navigate the world of work	1.2, 1.4, 3.1, 3.3, 3.6, 3.7	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role • Monitors and reviews organisational policies and procedures to identify required amendments and ensure compliance with relevant legislation
Interact with others	2.5, 3.4	• Selects and uses the appropriate form and mode of communication for a specific purpose and audience • Collaborates with others to achieve joint outcomes
Get the work done	1.1-1.6, 2.1-2.5, 3.1, 3.2, 3.4, 3.5, 3.6	• Plans and implements tasks according to required procedures and processes • Uses systematic, analytical processes to gather information, evaluate options and decide on actions • Recognises and anticipates an increasing range of familiar problems, actively looking for infringements and implementing required actions • Use digital systems and tools to access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBIPR404 Protect and use innovative designs	BSBIPR404A Protect and use innovative designs	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBIPR404 Protect and use innovative designs

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 issues with the use, management and protection of innovative designs
- develop and implement plans to manage and protect the organisation's innovative designs, and use others' designs legitimately, according to legislative requirements and organisational policies and procedures.

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 application guidelines, formats and procedures to protect innovative designs
- explain the requirements and purpose for registering a design
- outline relevant legislation concerning designs, including the overlap of intellectual property rights between design protection and copyright
- identify sources of information and advice about protection of designs.

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 – intellectual property field of work and include access to:

- information about relevant legislative requirements
- workplace procedures and resources
- information about innovative design protection requirements
- case studies and, where possible, real situations.

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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

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BSBIPR405 Protect and use intangible assets in small business

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 effectively protect and exploit the intellectual property of a small business. It focuses on identifying and valuing intangible assets, implementing measures to protect and commercialise these assets, as well avoiding the infringement of others' intellectual property rights.

It applies to individuals who either operate a small business or who are investigating the establishment of a small business. It particularly applies to small businesses that have intangible assets with market value which require protection, and which can be used to improve business performance.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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 Identify and value intangible assets which are key to small business	1.1 Identify intangible assets, which are a key to the ongoing success of the small business, through an intellectual property audit 1.2 Research appropriate sources of information and advice for protecting and effectively exploiting the small business's

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ELEMENT	PERFORMANCE CRITERIA
	intangible assets, and seek professional advice when required 1.3 Value intangible assets so they can be incorporated into the business plan and risk assessment strategy
2 Identify and select types of protection available for intangible assets	2.1 Identify the types of protection for intangible assets, including registered and unregistered protection 2.2 Identify relevant legislative requirements in relation to the proper use and protection of intangible assets 2.3 Calculate the likely costs, risks and benefits of potential types of protection available 2.4 Assess organisational requirements, and balance costs and benefits to select the most appropriate methods to protect and use intangible assets
3 Implement appropriate protection for intangible assets	3.1 Ensure all employees, partners and directors are aware of the importance to the small business of protecting intangible assets 3.2 Implement confidentiality agreements if appropriate with employees and others who might have access to commercially sensitive information 3.3 Search appropriate databases and other resources to determine whether the small business's intangible assets are original, to avoid infringement of the intangible assets of others 3.4 Follow procedures to protect intangible assets according to the type of protection required, using appropriate intellectual property professionals 3.5 Develop and implement processes for detecting and defending infringements against the small business's intangible assets 3.6 Monitor the market for possible infringements of protection of intangible assets and take appropriate action if required
4 Develop and implement processes to avoid infringement of the rights of others	4.1 Develop and implement processes so the small business does not infringe on others' intellectual property rights 4.2 Ensure all employees are aware of and understand the importance of avoiding infringing on others' intellectual property rights
5 Use and commercialise the small business's and others' intangible assets	5.1 Identify options for exploiting and commercialising own intangible assets 5.2 Identify intellectual property of others that can legally be used by the small business for business advantage 5.3 Identify taxation, accounting and financial reporting

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ELEMENT	PERFORMANCE CRITERIA
	requirements for any gains made from commercialisation of intangible assets

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, 2.1-2.4, 3.2-3.4, 3.6, 5.1- 5.3	• Researches and analyses a complex range of texts including organisational policies and procedures, databases and legislation to ensure full understanding of context and compliance requirements
Writing	1.1-1.3, 2.3, 3.1-3.3, 3.5, 3.6, 4.1, 4.2	• Summarises research findings relevant to small business • Records and maintains information in accordance with organisational requirements • Prepares information for the use of others using appropriate terminology and grammatical structure
Oral Communication	1.2, 3.1, 3.2, 3.4, 4.2	• Explains issues and requirements clearly using suitable language and non-verbal features • Obtains expert advice from others by listening and questioning
Numeracy	1.3, 2.3-2.4, 5.3	• Interprets a variety of numerical information and uses mathematical calculations to determine taxation requirements, cost/benefit analyses and asset valuations
Navigate the world of work	2.2, 2.4, 3.2-3.4, 4.1, 4.2, 5.2, 5.3	• Identifies and complies with legislative requirements associated with own role • Monitors and reviews organisational policies and procedures in accordance with own role and responsibility
Interact with others	1.2, 3.1, 3.2, 3.4, 4.2	• Selects and applies the appropriate form and mode of communication for a specific purpose and audience • Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1, 1.3, 2.1, 2.2, 2.4, 3.3, 3.5, 3.6,	• Uses formal, logical planning processes, and a good understanding of context, to develop processes to protect and use assets

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	4.1, 5.1, 5.3	• Uses systematic, analytical processes in complex situations, gathering relevant information and evaluating options for protecting assets • Selects ideas on the basis of their contribution to the achievement of broader goals • Uses digital systems and tools to access, extract and organise relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIPR405 Protect and use intangible assets in small business	BSBIPR405A Protect and use intangible assets in small business	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

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Assessment Requirements for BSBIPR405 Protect and use intangible assets in small business

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:

- complete an audit to identify the key intangible assets of a small business
- implement processes for the use, management and protection of intangible assets and legitimate use of others' intangible assets, according to organisational and legislative requirements
- communicate advice or recommendations about intangible asset protection.

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 range of intellectual property residing with the organisation
- explain processes that can be used to monitor the market for infringements against businesses' intangible assets
- outline the relevant legislative requirements as they apply to the job role
- explain the financial or taxation implications of gains made from commercialising of intangible assets
- summarise the relevant organisational policies and procedures that apply in this context.

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 – intellectual property field of work and include access to:

- relevant resources and equipment
- documentation including explanatory materials and guidelines

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- 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

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BSBIPR501 Manage intellectual property to protect and grow business

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 protect, secure and effectively use intangible assets of value to an organisation. It focuses on establishing and maintaining systems to protect and exploit an organisation's intellectual property to ensure business growth.

It applies to managers or coordinators who take an active role in recognising, securing and commercialising intangible assets which contribute to the organisation's profitability, productivity, product or service delivery and market leadership. These managers and coordinators may work in a range of industry or other contexts and may have responsibility for managing people, systems or processes.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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 Identify the organisation's intellectual property assets and rights	1.1 Identify the intangible assets residing within the organisation and how they can be protected 1.2 Identify the sections of the organisation in which intellectual

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ELEMENT	PERFORMANCE CRITERIA
	property is created, procured or transferred and for which management is required 1.3 Research intellectual property rights appropriate to the organisation according to legislative requirements 1.4 Identify and access sources of information and advice for protection of the organisation's intellectual property 1.5 Conduct a cost-benefit analysis of protecting intellectual property and determine risks 1.6 Identify and use appropriate intellectual property professionals to initiate processes to protect intellectual property, according to the type of intellectual property protection required
2 Create a strategy to manage the organisation's intellectual property	2.1 Review or create an organisational strategy and review or develop policies and procedures for protection, management and use of intellectual property as part of the organisation's business strategy 2.2 Plan and implement an intellectual property audit and establish or review the value and use of the organisation's intangible assets inventory 2.3 Plan and make recommendations for implementation of a strategy for business growth through use of organisation's intellectual property 2.4 Plan and implement strategies to ensure employees, partners and contractors protect the organisation's and others' intangible assets 2.5 Establish or review procedures to securely record and store documentation related to the organisation's intangible assets
3 Monitor and maintain organisational strategies for the protection and use of intellectual property	3.1 Regularly monitor and review strategies, policies and procedures for the identification, protection and use of intellectual property to ensure they are working effectively and make changes if required 3.2 Manage the identification of potential infringement of organisation's intellectual property rights and ensure appropriate action is taken 3.3 Promote a culture of compliance and respect for the intellectual property rights other organisations and individuals
4 Manage the commercialisation of the organisation's intellectual property to ensure business growth	4.1 Research the role intellectual property will play in the strategic plans of the organisation 4.2 Contribute to the implementation of the commercialisation of the organisation's intellectual property 4.3 Manage the review of the activities of existing or potential competitors and assess their impact on the organisation's intangible

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ELEMENT	PERFORMANCE CRITERIA
	assets 4.4 Access and effectively use others' intellectual property within legal guidelines for business advantage

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	1.1-1.5, 2.1-2.5, 3.1-3.2, 4.1, 4.3, 4.4	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Reviews, evaluates, interprets and applies content from a range of sources to aid in managing intellectual property
Writing	1.1-1.5, 2.1-2.5, 3.1-3.2, 4.1, 4.3	• Records and summarises information in accordance with organisational or regulatory requirements • Composes and edits texts, selecting appropriate vocabulary, structure and format for audience and purpose • Prepares correspondence and documentation according to organisational formats and protocols
Oral Communication	1.4, 1.6	• Explains issues and requirements clearly and obtains information from others by listening and questioning
Numeracy	1.5, 2.2	• Analyses numerical information to measure costs versus benefits • Estimates, calculates and records value of assets
Navigate the world of work	1.3, 2.1, 2.4, 2.5, 3.1, 4.1, 4.4	• Modifies or develops strategies, policies and procedures to comply with legislative requirements and organisation goals • Understands and applies knowledge of legislative and regulatory requirements in the conduct of own work
Interact with others	1.4, 1.6, 3.3, 4.2, 4.3	• Selects and uses appropriate communication practices and conventions for the purpose and audience • Collaborates with others to achieve joint outcomes
Get the work done	1.1-1.5, 2.1-2.5, 3.1, 3.2, 4.1-4.4	• Takes responsibility for planning, organising, implementing and reviewing systems and processes that could have legal implications

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		• Systematically gathers and analyses relevant information and evaluates options to make decisions about intellectual property compliance issues • Uses a range of digital technologies to access, analyse, organise, present and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIPR501 Manage intellectual property to protect and grow business	BSBIPR501A Manage intellectual property to protect and grow business	Updated to meet Standards for Training Packages Minor edits to clarify the intent of Performance Criteria	Equivalent unit

Links

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

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Assessment Requirements for BSBIPR501 Manage intellectual property to protect and grow business

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 and analyse information and advice from a range of sources to determine
  - legislation, regulations and organisational policies and procedures relevant to intellectual property (IP)
  - organisation's assets, their value and where they are created or procured
  - IP from other people or organisations that is used by the business
  - organisation's IP rights and options for protection
  - costs, benefits and risks of protecting IP
  - potential for business growth through organisation's IP
- review or develop organisational strategy, policies and procedures for protection, management and use of IP including
  - recordkeeping
  - ensuring employees, partners and contractors protect IP
  - identifying and responding to infringements
  - promoting a culture of compliance and respect for the intellectual property rights
- review and evaluate strategies, policies and procedures for IP and make adjustments and improvements as appropriate
- manage and contribute to the development and implementation of commercialisation of organisation's IP.

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 types of intellectual property as they relate to the organisation

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- explain processes for identifying and valuing the organisation's IP
- give examples of options for commercialisation of IP
- outline typical barriers to implementing policy and procedures to manage IP and possible strategies to address them
- identify relevant legislation and regulations relating to the organisation's intellectual property rights and responsibilities
- outline internal and external sources of information and advice relevant to intellectual property.

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 – intellectual property field of work and include access to:

- relevant legislation, standards and codes
- workplace documentation and resources
- 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

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BSBIPR601 Develop and implement strategies for intellectual property 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 obtain a strategic advantage from developing and implementing strategies for the management of intellectual property. It covers the evaluation of approaches to the management of intellectual property and focuses on establishing, implementing, evaluating and monitoring an organisation's intellectual property strategy.

It applies to directors or managers who take an active role in recognising and securing intangible assets which contribute to the organisation's profitability, productivity and market leadership. These managers and coordinators may work in a range of contexts and may have responsibility for managing people, systems or processes.

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

Unit Sector

Regulation, Licensing and Risk – Intellectual Property

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 Evaluate approaches to the management of intellectual property	1.1 Analyse strategic and operational plans to determine intellectual property requirements 1.2 Identify sources of information and advice regarding approaches

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ELEMENT	PERFORMANCE CRITERIA
	to the best practice management of intellectual property 1.3 Determine the implications and potential strategic advantage from protection of intellectual property 1.4 Determine the implications and potential strategic advantage from adopting a collaborative approach to intellectual property 1.5 Determine the implications and potential strategic advantage from adopting an open source approach to intellectual property
2 Establish a strategy for managing intellectual property	2.1 Develop an intellectual property strategy for management and use of own and others' intellectual property in line with the organisation's strategic goals or plans 2.2 Examine requirements and options for commercialisation or effective use of intellectual property 2.3 Establish required documentation for the management of the intellectual property strategy 2.4 Develop strategies for addressing intellectual property infringement 2.5 Ensure intellectual property strategy complies with legislative requirements and organisational policies 2.6 Communicate intellectual property strategy to key stakeholders within the organisation and externally
3 Evaluate proposed intellectual property strategy	3.1 Obtain legal and other professional advice regarding the proposed intellectual property management strategy 3.2 Identify and evaluate the benefits from the proposed intellectual property management strategy 3.3 Identify and evaluate the disadvantages, costs and risks of the proposed intellectual property management strategy 3.4 Adjust strategy according to legal advice and evaluation 3.5 Establish, document and present the business case for adopting the proposed intellectual property management strategy to senior management, directors and other key stakeholders
4 Implement and monitor the intellectual property management strategy	4.1 Work with others to ensure the implementation of the strategy 4.2 Monitor and evaluate the strategy and its implementation and report to senior management, directors and other key stakeholders 4.3 Make changes to strategy and its implementation as required

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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, 2.5, 3.2-3.4, 4.2, 4.3	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Evaluates, interprets and uses content obtained from various sources to develop or review strategies
Writing	1.1, 1.2, 2.1, 2.3, 2.4, 2.6, 3.2-3.5, 4.2, 4.3	• Records and summarises information in accordance with organisational or regulatory requirements • Composes and edits texts, selecting appropriate vocabulary, structure and format for audience and purpose • Prepares correspondence and documentation according to organisational formats and protocols
Oral Communication	2.6, 3.5, 4.1, 4.2	• Presents information 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
Numeracy	3.3, 4.2	• Reviews and analyses numerical data embedded in organisational documentation
Navigate the world of work	2.1, 2.5	• Modifies or develops strategies to meet organisational goals, and ethical and legislative requirements • Understands and applies knowledge of legislative and regulatory requirements in the conduct of own work
Interact with others	2.6, 3.5, 4.1, 4.2	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information • Plays a lead role in situations requiring effective collaboration, demonstrating the ability to engage and motivate others to achieve required outcomes
Get the work done	1.1-1.5, 2.1-2.4, 3.1-3.5, 4.2, 4.3	• Takes responsibility for planning, organising, implementing and reviewing processes to ensure effective implementation of intellectual property strategy • Systematically gathers and analyses all relevant information and evaluates options in order to make decisions about intellectual property strategies • Evaluates outcomes of decisions to identify opportunities for improvement

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		• Uses analytical and lateral thinking to review current practices and develop new ideas • Uses a range of digital technologies to access, analyse, organise, present and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBIPR601 Develop and implement strategies for intellectual property management	BSBIPR601A Develop and implement strategies for intellectual property 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

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Assessment Requirements for BSBIPR601 Develop and implement strategies for intellectual property 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:

- identify and analyse information from a range of sources to determine
  - legislation, regulations and organisational policies and procedures relevant to intellectual property (IP)
  - IP requirements in relation to organisational strategic or operational goals
  - current industry best practice of IP management
  - implications and/or strategic advantage of adopting particular approaches to managing IP
- develop and evaluate a strategy for managing intellectual property that complies with legislative requirements and organisational policies, goals or plans
- develop and present a business case to decision makers
- implement, monitor and evaluate the strategy and its implementation and make improvements as appropriate
- consult and communicate effectively with stakeholders to establish, evaluate or implement the strategy.

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 types of intellectual property as they relate to the organisation
- give examples of options for commercialisation of IP
- outline typical barriers to making and implementing strategic decisions about IP and possible strategies to address them
- explain the typical advantages and disadvantages of alternative approaches to managing intellectual property

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- identify relevant legislation and regulations relating to the organisation's intellectual property rights and responsibilities
- outline internal and external sources of information and advice relevant to intellectual property.

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 – intellectual property field of work and include access to:

- relevant legislation, standards and codes
- workplace documentation and resources
- 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

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BSBITA401 Design databases

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 design and develop a database (including queries, forms and reports) to meet a defined need using existing data.

It applies to individuals who may work independently or within an administrative support role, with the responsibility to use databases to store and retrieve data using commercially available database software.

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

Unit Sector

Information and Communications Technology – IT Analysis and Design

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. Design database	1.1 Review organisational and task requirements to confirm scope and functionality of database design, including data redundancy 1.2 Develop a logical data model to identify and classify data into types 1.3 Select appropriate software according to organisational and task requirements and required scope and functionality of database 1.4 Confirm database design with appropriate person

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ELEMENT	PERFORMANCE CRITERIA
2. Develop database	2.1 Set field attributes according to data type and link databases by a common field in accordance with software procedures 2.2 Identify primary key to uniquely identify data 2.3 Identify foreign keys to establish associations between data 2.4 Use software functions and formulae to meet organisational and task requirements 2.5 Create password and access system according to organisational and task requirements
3. Develop queries, forms and reports	3.1 Develop queries as required by organisational and task requirements 3.2 Develop input screens or forms to access required data 3.3 Develop reports according to organisational and task requirements
4. Test and finalise database	4.1 Populate database with sample dataset for testing 4.2 Assess and document effectiveness of data relationships, query forms and reports 4.3 Address any errors in database design 4.4 Name and store database in accordance with organisational requirements and exit the application without data loss or damage 4.5 Confirm database readiness with appropriate person

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, 2.1-2.5, 3.1-3.3, 4.1-4.4	• Comprehends the main messages in texts of varying complexity
Writing	1.2, 2.4, 2.5, 3.1-3.3, 4.1-4.5	• Uses basic models to produce a range of text types with formatting and font chosen appropriate to database design • Uses technical information and structure appropriate to the requirements of the audience and purpose

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Oral Communication	1.4, 4.5	• Confirms requirements using industry-specific language
Numeracy	1.2, 2.1-2.4, 3.1-3.3, 4.1-4.3	• Extracts, interprets and comprehends routine formulae and software functions to establish data relationships
Navigate the world of work	4.4	• Adheres to organisational policies and procedures relevant to own role
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.3, 4.1-4.4	• Develops plans to manage relatively complex, non-routine tasks according to organisational requirements • Takes responsibility for the outcomes of routine decisions related directly to own role • Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to design, develop and test database functions • Recognises and takes responsibility for addressing predictable database problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITA401 Design databases	BSBITA401A Design databases	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

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Assessment Requirements for BSBITA401 Design databases

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:

- produce a database, containing a minimum of THREE tables, which uses queries, reports and forms
- communicate with relevant personnel to check database design against 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:

- describe how the advanced functions of database software applications are to be applied
- describe the impact of formatting and design on the presentation and readability of data.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT analysis and design field of work and include access to:

- office equipment and resources
- sample 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBITA601 Configure and optimise customer contact 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 establish optimal functionality and efficiency from technologies by configuring them to best suit operational needs.

It applies to individuals working at a managerial or specialist level and within a customer contact environment where complex technology is employed and where the configuring of this technology is undertaken on an ongoing basis to maximise efficiencies and benefits to the organisation.

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

Unit Sector

Information and Communications Technology – IT Analysis and Design

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. Analyse current capability of customer contact technology	1.1 Clearly specify the role of customer contact technology in customer contact operations 1.2 Recognise the scope of the functions supplied by the technology 1.3 Accurately align the capabilities of the technology to current and potential operational needs

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ELEMENT	PERFORMANCE CRITERIA
2. Benchmark competing new technology applications	2.1 Identify specific operational needs that can be met by technology 2.2 Identify the range of functions and capabilities supplied by benchmarking competing technologies 2.3 Select critical features of competing technologies for analysis 2.4 Conduct an analysis of technologies using cost effective processes 2.5 Select or report on appropriate new technology by considering the analysis of critical features
3. Develop a customer contact system configuration	3.1 Identify and analyse business model to be facilitated by technology 3.2 Identify the required technology components 3.3 Identify all specific contact pathways to be managed by technology 3.4 Arrange configuration of technology to satisfy the business model and contact pathways 3.5 Develop comprehensive testing program to ensure delivery and reliability of new configuration 3.6 Evaluate configuration against business model dimensions
4. Develop a strategy to optimise current technology	4.1 Identify unused capacity in existing technology 4.2 Identify applications for unused capacity appropriate to operational or business model 4.3 Develop a strategy for exploiting additional capacity 4.4 Assess the cost and efficiency of the strategy against available resources and budget 4.5 Recommend a course of action in accordance with the assessment

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

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Reading	1.2-1.3, 2.1-2.5, 3.1, 3.2, 3.4, 4.1-4.4	• Interprets and analyses complex textual information to verify requirements and enhance system and user capabilities
Writing	1.1, 1.3, 2.3-2.5, 3.1-3.5, 4.1-4.3, 4.5	• Prepares structured documents using appropriate specialised vocabulary to convey complex ideas, strategies and recommendations specific to the target audience
Oral Communication	1.1, 2.5, 4.5	• Engages in discussions to establish requirements and presents relatively complex information clearly using appropriate language and non-verbal features
Numeracy	2.2, 2.4, 4.4	• Comprehends, analyses and manipulates mathematical information for critical review and to achieve optimal outcomes
Navigate the world of work	1.3, 2.1, 3.4, 3.6, 4.2	• Understands how own role contributes to the broader business and financial objectives of the organisation
Get the work done	1.1-1.3, 2.1-2.3, 2.5, 3.1-3.6, 4.1-4.3, 4.5	• Uses formal processes to identify key information and requirements, evaluate options and consider implementation issues and contingencies • Takes responsibility for high impact decisions in complex situations involving multiple variables and constraints • Actively identifies systems, devices and applications with potential to meet current and/or future needs • Uses a broad range of strategies to store, access and organise digital information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITA601 Configure and optimise customer contact technology	BSBITA601A Configure and optimise customer contact technology	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBITA601 Configure and optimise customer contact 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:

- complete the analysis, benchmarking and configuration of customer contact technology
- develop and recommend an optimisation strategy for current technology
- manage effective written and verbal communication.

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 the relevant benchmarking principles
- describe the budgeting and cost benefit analysis principles
- describe the business case preparation principles
- identify business objectives and goals
- describe the following customer contact technologies:
  - communications technologies
  - automatic call distributor (ACD) systems
  - interactive voice response (IVR) systems and databases
  - computer telephony integration (CTI) systems
  - prescriptive dialling, computer-based customer relationship management (CRM) systems
  - information management systems
- identify the needs of internal and external customers that must be considered when evaluating available customer contact technology
- outline sections of the operational budget and business plan relevant to customer contact technology implementation.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT analysis and design field of work and include access to:

- workplace information, reporting and data
- stakeholder feedback
- case studies or, 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

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BSBITB501 Establish and maintain a workgroup computer network

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 a workgroup computer network with an information technology consultant and to manage the network by keeping records, responding to problems, assisting users and providing training.

It applies to individuals employed in a range of work environments who are required to apply broad knowledge of computer networks; they may be responsible for installing and maintaining the network, but they will work closely with computer professionals in all aspects of this process. In doing so, they may provide administrative support within an enterprise, or may have been delegated these responsibilities for their workgroup or organisation.

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

Unit Sector

Information and Communications Technology – IT Building and Implementation

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. Manage establishment of a workgroup network	1.1 Determine current and anticipated future network requirements with nominated person in accordance with organisational policy and budgetary constraints 1.2 Ensure selected network is compatible with current

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ELEMENT	PERFORMANCE CRITERIA
	organisational software, hardware and work practices 1.3 Obtain and install equipment in accordance with organisational requirements and manufacturers' instructions 1.4 Install software in accordance with organisational requirements and the manufacturers' instructions 1.5 Ensure establishment of network promotes efficiency and access for users
2. Manage maintenance of a workgroup network	2.1 Establish and maintain records to ensure control and security of hardware and software stock, in accordance with organisational policy and procedures 2.2 Respond to network problems and rectify minor faults in accordance with organisational requirements 2.3 Report major problems and consult computer experts in accordance with organisational policy and procedures 2.4 File and store software in accordance with organisational procedures 2.5 Recommend improvements for the network to appropriate personnel
3. Assist and train network users	3.1 Provide training for staff to use the network in accordance with needs 3.2 Assist network users to maximise network potential 3.3 Examine user skills and provide access to appropriate training to improve individual and workgroup efficiency of network use

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, 2.1, 2.3, 2.4	• Identifies and interprets workplace texts, including organisational policies and technical instructions, to identify relevant information
Writing	2.1, 2.3, 2.5	• Maintains accurate records and produces reports and recommendations using formats, terminology and conventions specific to workplace requirements

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Oral Communication	1.1, 2.3, 2.5, 3.1-3.3	• Explains issues and requirements clearly using appropriate vocabulary and non-verbal features • Obtains information using active listening and questioning skills
Numeracy	1.1	• Identifies and interprets numerical information within budgets
Navigate the world of work	1.1, 1.3, 1.4, 2.1-2.4	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.1, 2.3, 2.5, 3.1-3.3	• Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts • Collaborates with others, playing an active role in facilitating effective outcomes
Get the work done	1.1-1.5, 2.2-2.4, 3.3	• Plans and implements routine and non-routine tasks according to organisational requirements • Makes a range of critical and non-critical decisions in relatively complex situations, • Uses problem solving techniques to address issues of increasing complexity within own scope • Uses digital systems and tools to file and store information and programs in accordance with the organisation's requirements • Reflects on the ways in which digital systems and tools are used, or could be used to achieve work goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITB501 Establish and maintain a workgroup computer network	BSBITB501A Establish and maintain a workgroup computer network	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

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Assessment Requirements for BSBITB501 Establish and maintain a workgroup computer network

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, install and maintain software and hardware in accordance with network and organisation requirements
- identify and address network problems
- consult with information technology (IT) professionals
- provide training or assistance to users on using the network.

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 features of computer networking
- outline organisational policies and procedures relating to the tasks required
- describe software licensing rights and responsibilities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT building and implementation field of work and include access to:

- office equipment
- networked computers
- appropriate software.

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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

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BSBITB801 Implement advanced electronic technologies

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 improve business, learning and knowledge outcomes through implementing advanced electronic technologies.

It applies to individuals in senior management roles working to ensure learning advances individual and organisational capabilities. Individuals who provide learning should be able to make complex judgements and implement advanced electronic technologies such as those associated with electronic business (e-business) models; electronic retail (e-retail) sales, service and payment solutions; mobile and wireless technologies; and technologies relating to the management of the supply chain.

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

Unit Sector

Information and Communications Technology – IT Building and Implementation

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. Implement electronic technologies to advance business models	1.1 Determine and communicate to stakeholders the commercial set up of the business to supply electronic commerce (e-commerce) products or services 1.2 Analyse and evaluate e-business models appropriate to a specific operational context

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Implement arrangements for conducting e-commerce appropriate to data management, and business and organisational requirements 1.4 Ensure e-business models interoperate technically and operationally with organisation's management of customer service, performance, learning and decision support 1.5 Implement customer authentication and transaction systems appropriate to business and organisational requirements 1.6 Review and report opportunities to improve e-commerce infrastructure, systems and solutions
2. Implement electronic technologies to advance retail sales operations	2.1 Determine and communicate to stakeholders the commercial set up of the business to supply e-retail services 2.2 Analyse and evaluate appropriate e-retail tools and processes 2.3 Align e-retail strategy with business strategies, and business and organisational requirements 2.4 Implement arrangements for conducting e-retailing appropriate to business and organisational requirements 2.5 Review and report opportunities to improve e-retail infrastructure, systems and solutions
3. Implement electronic technologies to advance mobile operations	3.1 Identify and communicate to stakeholders, range of options available in mobile computing devices and mobile technologies appropriate to business unit and organisational requirements 3.2 Confirm trends in mobile commerce and related systems 3.3 Research trends in mobile internet and other communication networks 3.4 Implement arrangements for mobile commerce and related systems appropriate to business and organisational requirements 3.5 Review and report opportunities to improve mobile electronic infrastructure, systems and solutions
4. Implement electronic technologies to advance supply chain management	4.1 Determine and communicate to stakeholders the commercial set up of the business to electronically manage a supply chain 4.2 Research and report strengths and weaknesses of options relating to electronic enhancement of supply chain management 4.3 Develop electronic supply chain model and strategy 4.4 Align supply chain management with e-business strategies and model 4.5 Implement electronic supply chain model

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ELEMENT	PERFORMANCE CRITERIA
	4.6 Review and evaluate electronic supply chain model against business and organisational requirements 4.7 Determine and report enhancements to electronic enablement of supply chain

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	1.1-1.6, 2.1-2.5, 3.1, 3.3, 3.5, 4.1, 4.2, 4.4, 4.6, 4.7	• Interprets, analyses and evaluates a range of textual information to assist with decisions and choices relating to the implementation of advanced electronic technologies
Writing	1.1-1.4, 1.6, 2.1-2.5, 3.1-3.3, 3.5, 4.1-4.7	• Develops material for a specific audience using clear and detailed language to convey information, report on opportunities, and implement supply chain models
Oral Communication	1.1, 1.6, 2.1, 2.5, 3.1, 3.5, 4.1, 4.2, 4.7	• Presents information using structure and language appropriate for the audience • Uses active listening and questioning to clarify and confirm understanding
Numeracy	3.2, 3.3	• Selects from and applies an expanding range of mathematical and problem-solving strategies to analyse and confirm trends in mobile commerce and mobile internet networks
Navigate the world of work	1.3, 1.5, 2.3, 2.4, 3.4, 4.6	• Establishes processes in accordance with organisational policies and procedures • Considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.1, 1.6, 2.1, 2.5, 3.1, 3.5, 4.1, 4.2, 4.7	• Selects and uses appropriate conventions and protocols when consulting and communicating in a range of work contexts
Get the work done	1.1-1.5, 2.1-2.5, 3.2, 3.5, 4.1-4.5, 4.7	• Plans, implements and monitors complex tasks including scheduling communications with key stakeholders • Takes responsibility for high impact decisions involving analysis and evaluation of complex variables • Keeps abreast of new technologies to identify

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		opportunities to improve organisational outcomes • Uses digital tools to access and organise complex data and analyse multiple sources of information for strategic purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITB801 Implement advanced electronic technologies	BSBITB701A Implement advanced electronic technologies	Updated to meet Standards for Training Packages Recoded to meet AQF 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

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Assessment Requirements for BSBITB801 Implement advanced electronic technologies

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:

- research and evaluate appropriate electronic technology for a given business system
- analyse, develop and implement plans for an effective e-business solution, e-retail solution, mobile business solution and electronic supply chain management solution to meet specific organisational 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 trends in e-commerce and e-business systems
- outline business policies and procedures impacting job role or function
- identify relevant legislation, codes and standards relevant to the implementation of electronic technologies, including any obligations under the Australian Quality Training Framework (AQFT) Standards
- explain the effects of infrastructure on implementation of electronic technologies
- outline the technologies for implementing secure electronic payments
- explain methods for assuring safe and secure payment using electronic media
- explain current computing devices and technologies for mobile commerce
- explain principles of supply chain management.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT building and implementation field of work and include access to required assessment facilities 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

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BSBITS401 Maintain business 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 maintain the effectiveness of business technology in the workplace. It includes maintaining existing technology and planning for future technology requirements.

It applies to individuals with a broad knowledge of business technology who may be required to contribute well-developed skills in creating solutions to maintenance and upgrade issues with existing technology. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

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

Unit Sector

Information and Communications Technology – IT Support

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. Maintain performance of hardware and software	1.1 Monitor and evaluate system effectiveness to ensure it meets organisational and system requirements 1.2 Use operating system, drive and disk structure, reports and files to identify performance problems 1.3 Maintain disk drives and peripherals according to manufacturers' and organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Replace consumables in accordance with manufacturers' and organisational requirements
2. Provide basic system administration	2.1 Carry out system back-up procedure at regular intervals according to organisational and system requirements 2.2 Install and operate software applications in accordance with developers' and organisational requirements 2.3 Maintain and update security access procedures in line with organisational requirements 2.4 Ensure that licences for use of software are used, checked and recorded in accordance with organisational requirements 2.5 Regularly maintain and update virus programs in accordance with organisational requirements
3. Identify future technology requirements	3.1 Maintain knowledge of current and new technology by regularly accessing sources of information 3.2 Identify and develop improved technology systems using feedback from clients and colleagues 3.3 Assess existing technology against newly available technology to determine future needs and priorities 3.4 Identify and select new technologies to achieve and maintain continuous organisational development 3.5 Obtain management and budget approval for new selected technologies

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, 2.1-2.5, 3.1-3.4	• Gathers, analyses and interprets a range of textual information from a variety of sources and identifies relevant information
Writing	2.3, 2.4, 3.5	• Produces texts of varying complexity using appropriate language and logical structure to record and convey information

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Navigate the world of work	1.1, 1.3, 1.4, 2.1-2.5	• Complies with organisational policies and legal responsibilities related to own work
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.5	• Plans, implements and monitors tasks required to achieve required outcomes • Takes responsibility for the outcomes of routine decisions directly related to own role • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts • Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks • Identifies innovations by monitoring trends from other contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITS401 Maintain business technology	BSBITS401A Maintain business 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

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Assessment Requirements for BSBITS401 Maintain business 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:

- install software and hardware and maintain performance according to manufacturers' and organisational requirements
- organise and access software, materials and consumables
- maintain and update technology and security systems.

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 the costs and benefits of technology maintenance
- describe the general features and capabilities of current industry-accepted hardware and software products
- explain the importance of:
  - back-up and security procedures
  - maintenance and diagnostic procedures
  - licensing, installation and purchasing procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT support field of work and include access to:

- case studies and, where possible, real situations
- office equipment and resources

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- examples of technology maintenance and security procedures.

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

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BSBITU101 Operate a personal computer

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 start up and use a range of basic functions on a personal computer or business computer terminal.

It applies to individuals who perform a range of routine computer 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

Information and Communications Technology – IT Use

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 Start computer, system information and features	1.1 Adjust workspace, furniture and equipment to suit user ergonomic requirements 1.2 Ensure work meets organisational and work health and safety (WHS) requirements for computer operation 1.3 Start computer or log on according to user procedures 1.4 Identify basic functions and features using system information 1.5 Customise desktop configuration, if necessary, with assistance from appropriate persons

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Use help functions as required
2 Navigate and manipulate desktop environment	2.1 Open, close and access features by selecting correct desktop icons 2.2 Open, resize and close desktop windows by using correct window functions 2.3 Create shortcuts onto the desktop, if necessary, with assistance from appropriate persons
3 Organise files using basic directory and folder structures	3.1 Create folders/subfolders with suitable names 3.2 Save files with suitable names in appropriate folders 3.3 Rename and move folders/subfolders and files as required 3.4 Identify folder/subfolder and file attributes 3.5 Move folders/subfolders and files using cut and paste, and drag and drop techniques 3.6 Save folders/subfolders and files to appropriate media where necessary 3.7 Search for folders/subfolders and files using appropriate software tools 3.8 Restore deleted folder/subfolders and files as necessary
4 Print information	4.1 Print information from installed printer 4.2 View progress of print jobs and delete as required 4.3 Change default printer, if installed
5 Shut down computer	5.1 Close all open applications 5.2 Shut down computer according to user 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 Criteria	Description
Reading	1.3, 1.5, 1.6, 3.1-3.8, 4.1-4.3, 5.1, 5.2	• Recognises textual information within internal procedures and technical documents to determine and complete work requirements

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Writing	1.3, 3.1-3.3, 3.7	• Inputs information using familiar text types and records numerical and textual information for file naming conventions
Oral Communication	1.5, 2.3	• Asks simple questions and comprehends answers that contain short and explicit information
Navigate the world of work	1.1-1.3, 5.2	• Recognises and follows organisational procedures and legislative responsibilities, with particular reference to health and safety
Interact with others	1.5, 2.3	• Uses appropriate communication practices to seek guidance from more experienced work colleagues
Get the work done	1.3-1.6, 2.1-2.3, 3.1-3.8, 4.1-4.3, 5.1, 5.2	• With guidance, is beginning to understand and use the specific functions and features of digital systems and tools

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU101 Operate a personal computer	BSBITU101A Operate a personal computer	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

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Assessment Requirements for BSBITU101 Operate a personal computer

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:

- adjust equipment, furniture and workspace to suit individual ergonomic requirements
- follow organisational and WHS requirements when operating a computer
- follow user procedures and system information when using the basic functions on a computer, seeking assistance when necessary
- use desktop icons and create shortcuts
- create and manipulate folders and subfolders
- check and delete print jobs and change default printer
- correctly shut down software applications and the computer.

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 the main work health and safety requirements for working with a computer
- list the main points to consider when setting up an ergonomic work environment
- list the main components of the computer system, and briefly explain what each one does
- briefly explain the functions of the operating system
- outline the organisation’s conventions for naming files

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

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- organisational policies and procedures
- information about work health and safety requirements.
- computer user and system information
- suitable workspace including a personal computer or computer terminal with relevant software and printer.

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

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BSBITU102 Develop keyboard skills

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 basic keyboard skills using touch typing techniques in a broad range of settings.

It applies to individuals who perform a range of mainly routine tasks and generally work under direct supervision using limited practical skills and fundamental knowledge.

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

Unit Sector

Information and Communications Technology – IT Use

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. Use safe work practices	1.1 Adjust workspace, furniture and equipment to suit user ergonomic requirements 1.2 Ensure work meets organisational and work health and safety (WHS) requirements for computer operation
2. Identify and develop keyboard skills	2.1 Identify and apply keyboard functions for both alpha and numeric keyboard functions 2.2 Apply touch typing technique to complete a task 2.3 Develop speed and accuracy in accordance with workplace

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ELEMENT	PERFORMANCE CRITERIA
	requirements for level of responsibility
3. Check accuracy	3.1 Proofread document carefully to identify errors 3.2 Amend document, correct errors and complete a final accuracy check

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, 3.2	• Comprehends textual information in workplace documents to confirm work requirements • Checks own work to identify errors
Writing	2.2, 2.3, 3.2	• Enters and edits numerical and textual information according to a defined format
Navigate the world of work	1.1, 1.2, 2.3	• Complies with organisational and legislative requirements and meets expectations associated with own role
Get the work done	2.1-2.3, 3.1, 3.2	• Understands the specific functions and features of digital tools and uses these to perform 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.

Speed and accuracy must be:	• consistent with degree of experience of operator • relevant to level of responsibility.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU102 Develop keyboard skills	BSBITU102A Develop keyboard skills	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

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Assessment Requirements for BSBITU102 Develop keyboard skills

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 ergonomic and organisational and work health and safety (WHS) requirements
- use keyboard functions to enter alpha and numeric data
- develop touch-typing techniques and speed and accuracy
- proofread and edit documents.

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 key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as WHS
- identify organisational benchmarks for keyboarding.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- industry software packages
- organisational policies and procedures
- relevant legislation
- relevant workplace documentation and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBITU201 Produce simple word processed documents

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 basic keyboard skills using touch typing techniques in a broad range of settings.

It applies to individuals who perform a range of mainly routine tasks and generally work under direct supervision using limited practical skills and fundamental knowledge.

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

Unit Sector

Information and Communications Technology – IT Use

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. Prepare to produce documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met 1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3 Identify organisational and task requirements for document layout and design
2. Produce documents	2.1 Format document using appropriate software functions to

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ELEMENT	PERFORMANCE CRITERIA
	adjust page layout to meet information requirements, in accordance with organisational style and presentation requirements 2.2 Use system features to identify and manipulate screen display options and controls 2.3 Use manuals, user documentation and online help to overcome problems with document presentation and production
3. Finalise documents	3.1 Ensure final document is previewed, checked, adjusted and printed in accordance with organisational and task requirements 3.2 Ensure document is prepared within designated timelines and organisational requirements 3.3 Name and store document in accordance with organisational requirements and exit application without information loss/damage

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, 3.3	• Recognises textual information within organisational and task requirements to determine work requirements
Writing	3.1, 3.3	• Records numerical and textual information in accordance with requirements of task
Oral Communication	1.2	• Participates in a variety of spoken exchanges with relevant personnel in an effort to clarify document purpose, audience and presentation requirements
Navigate the world of work	1.1-1.3, 2.1, 3.1-3.3	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2	• May seek guidance from more experienced work colleagues
Get the work done	2.1-2.3, 3.1-3.3	• Understands functions and features of specific computer software and uses these to perform work tasks

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU201 Produce simple word processed documents	BSBITU201A Produce simple word processed documents	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

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Assessment Requirements for BSBITU201 Produce simple word processed documents

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:

- produce documents following correct ergonomic, conservation requirements and organisational policies and procedures
- adhere to organisational style manual when formatting documents
- refer to help function and user documentation to rectify document problems
- use system features
- follow designated timelines when preparing documents.

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 basic formatting styles and their affect on formatting, readability and appearance of documents
- describe purpose, use and function of word processing software
- outline organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- describe what is contained in an organisational style guide.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- industry software packages
- computer user information

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- relevant legislation and codes of practice
- organisational policies and procedures
- relevant workplace documentation and resources including a style guide and user manuals.

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

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BSBITU202 Create and use spreadsheets

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 correctly create and use spreadsheets and charts using spreadsheet software.

It applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of creating spreadsheets 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

Information and Communications Technology – IT Use

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. Select and prepare resources	1.1 Adjust workspace, furniture and equipment to suit own ergonomic, work organisation and work health and safety (WHS) requirements 1.2 Use energy and resource conservation techniques to minimise wastage in accordance with organisational and statutory requirements 1.3 Identify spreadsheet task requirements and clarify with relevant personnel as required

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ELEMENT	PERFORMANCE CRITERIA
2. Create simple spreadsheets	2.1 Ensure data is entered, checked and amended in accordance with organisational and task requirements, to maintain consistency of design and layout 2.2 Format spreadsheet using software functions; to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements 2.3 Ensure formulae are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required 2.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production
3. Produce simple charts	3.1 Select chart type and design that enables valid representation of numerical data and meets organisational and task requirements 3.2 Create chart using appropriate data range in spreadsheet 3.3 Modify chart type and layout using formatting features
4. Finalise spreadsheets	4.1 Ensure spreadsheet and any accompanying charts are previewed, adjusted and printed in accordance with organisational and task requirements 4.2 Ensure data input meets designated timelines and organisational requirements for speed and accuracy 4.3 Name and store spreadsheet in accordance with organisational requirements and exit application without data loss/damage

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, 2.4, 4.1, 4.3	• Recognises numerical and textual information within a range of resources to determine and complete work according to requirements
Writing	2.1, 2.3, 3.2, 4.1, 4.3	• Enters and amends routine data into software using a format appropriate to requirements
Oral	1.3, 2.3	• Listens to short and specific instructions and uses questions to clarify understanding

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Communication		• Uses simple mathematical language to confirm and convey requirements
Numeracy	2.1, 2.3, 3.1, 3.2	• Uses basic mathematical skills to create and apply spreadsheet formulae
Navigate the world of work	1.1-1.3, 2.1, 2.2, 3.1, 4.1-4.3	• Recognises, understands and adheres to legislative and organisational requirements in undertaking own work
Interact with others	1.3	• Recognises purpose of various communications directly relevant to own role and clarifies as required
Get the work done	1.3, 2.1-2.4, 3.1-3.3, 4.1-4.3	• Uses key software features and functions in performing specific work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU202 Create and use spreadsheets	BSBITU202A Create and use spreadsheets	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

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Assessment Requirements for BSBITU202 Create and use spreadsheets

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:

- produce documents following correct ergonomic, conservation, organisational and statutory requirements
- consult with appropriate personnel as required
- adhere to organisational style and presentation requirements
- refer to online help function and user documentation to rectify document problems
- create and modify simple charts
- follow designated timelines and ensure high accuracy when preparing documents
- demonstrate ability to prevent data loss and damage.

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:

- demonstrate knowledge of how to format workplace documents
- describe organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques
- outline organisational guidelines on spreadsheet manipulation and processing
- explain purpose and range of use of spreadsheet functions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- industry technology

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- organisational policies and procedures
- relevant legislation
- user manuals
- relevant workplace documentation and resources
- 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBITU203 Communicate electronically

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 send, receive and manage electronic mail (email), as well as collaborate online using chat rooms, intranets and instant messaging.

It applies to individuals who use business technology to perform a range of routine tasks to communicate with co-workers, customers or others. 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

Information and Communications Technology – IT Use

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. Implement procedures to send and receive electronic mail	1.1 Login to software for sending and receiving email in accordance with organisational requirements 1.2 Check outgoing email for accuracy and ensure any required attachments are prepared, in accordance with organisational and service provider requirements 1.3 Identify urgent, confidential, personal, suspicious or potentially dangerous email and take appropriate action

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Deal with returned email in accordance with organisational policies and procedures
2. Manage electronic mail	2.1 Set security levels and/or filters for incoming email in accordance with organisational requirements 2.2 Create and maintain individual mailboxes in accordance with organisational requirements 2.3 Store email and/or attachments in accordance with organisational requirements 2.4 Empty inboxes and archive or permanently delete in accordance with organisational requirements 2.5 Prepare and maintain electronic mailing lists in accordance with organisational requirements
3. Collaborate online	3.1 Identify software to be used in collaboration 3.2 Ensure online collaboration is undertaken in accordance with organisational policy, procedures and net etiquette (netiquette) 3.3 Respond to posts or communications in accordance with agreed parameters, organisational requirements and netiquette

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, 2.1-2.5, 3.2, 3.3	• Recognises textual information within different materials and interprets information to determine requirements as well as confirming accuracy of content
Writing	1.1, 2.2, 2.5, 3.2, 3.3	• Records key information relevant to requirements and prepares simple correspondence using basic punctuation, text and correct spelling
Oral Communication	1.4	• Obtains information through listening and questioning and uses clear and appropriate language suitable to audience
Navigate the world of work	1.1, 1.2, 1.4, 2.1-2.5, 3.2, 3.3	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role

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Get the work done	1.3	• Recognises and responds to routine problems in context of own work

Range of Conditions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU203 Communicate electronically	BSBITU203A Communicate electronically	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

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Assessment Requirements for BSBITU203 Communicate electronically

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 organisational and service provider requirements when communicating electronically
- follow organisational policy and procedures when managing all aspects of electronic communication
- comply with netiquette
- collaborate in accordance with agreed parameters for electronic communication
- identify most appropriate software applications.

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 different methods of electronic communication
- outline key provisions of relevant legislation that affect aspects of business operations
- outline relevant organisation policies and procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant legislation
- relevant workplace documentation and resources
- industry software packages.

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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

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BSBITU301 Create and use databases

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 create simple two-table relational databases with reports and queries, for storage and retrieval of information.

It applies to individuals that may provide administrative support within an enterprise, or may be independently responsible for storage and retrieval of data relating to their own work roles.

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

Unit Sector

Information and communications Technology – IT use

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. Create a simple database	1.1 Design a simple database, with at least two tables, using a database application, basic design principles, software functions and simple formulae 1.2 Develop a table with fields and attributes according to database usage, as well as data considerations and user requirements 1.3 Create a primary key for each table 1.4 Modify table layout and field attributes as required

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Create a relationship between the two tables 1.6 Check and amend data entered, in accordance with organisational and task requirements
2. Create reports and queries	2.1 Determine information output, database tables to be used and report layout to meet task requirements 2.2 Determine data groupings, search and sort criteria to meet task requirements 2.3 Run reports and queries to check results and formulae provide the required data 2.4 Modify reports to include or exclude additional requirements
3. Use database	3.1 Ensure data input meets designated timelines and organisational requirements for speed and accuracy 3.2 Use manuals, user documentation and online help to overcome problems with database design and production 3.3 Preview, adjust and print database reports or forms in accordance with organisational and task requirements 3.4 Name and store databases, in accordance with organisational requirements, and exit application without data loss or damage 3.5 Prepare and distribute reports to appropriate person in a suitable format

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	1.1-1.6, 2.1-2.4, 3.1-3.5	• Recognises and interprets textual and numerical information to determine and confirm tasks are completed as per requirements
Writing	1.1-1.6, 2.1-2.4, 3.1-3.4	• Inputs numerical and key reporting information when creating and querying databases, and uses standard naming conventions and format to organise data
Numeracy	1.1, 1.2, 1.6, 2.1-2.4	• Uses mathematical equations to create simple database queries and formulae

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Navigate the world of work	1.2, 1.4, 1.6, 2.1-2.3, 3.1, 3.3, 3.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	1.1-1.6, 2.1-2.4, 3.1-3.5	• Plans, organises and competes tasks to meet organisational requirements • Utilises a broad range of features within applications in performing routine and complex tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU301 Create and use databases	BSBITU301A Create and use databases	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

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Assessment Requirements for BSBITU301 Create and use databases

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:

- adhere to organisational requirements when inputting, amending and storing data including:
  - correct naming conventions
- adhere closely to task requirements including:
  - following designated timelines
  - achieving speed and accuracy
- create simple databases including:
  - reports and queries
- follow designated timelines
- correctly name and store data
- distribute reports to appropriate personnel.

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 provisions of relevant legislation, standards and codes that may affect aspects of business operations
- describe organisational requirements relating to data entry, storage and presentation.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- business technology
- workplace documentation and resources
- industry database software applications.

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

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BSBITU302 Create electronic presentations

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 design and produce electronic presentations for speakers, for self access and online access.

It 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

Information and Communications Technology – IT Use

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. Prepare to create presentation	1.1 Organise personal work environment in accordance with ergonomic requirements 1.2 Determine purpose, audience and mode of presentation in consultation with content author or presenter 1.3 Identify presentation requirements in terms of supporting documents and equipment 1.4 Apply work organisation strategies and energy and resource

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ELEMENT	PERFORMANCE CRITERIA
	conservation techniques to plan work activities
2. Create presentation	2.1 Design slides, notes and handout masters to incorporate organisational and task requirements in relation to image and preferred style, avoiding distractions 2.2 Use software functions for consistency of design and layout, to meet identified presentation requirements 2.3 Balance presentation features for visual impact and emphasis 2.4 Use advanced software features to streamline and customise presentation for different audiences 2.5 Prepare presentation within designated timeline
3. Finalise presentation	3.1 Use manuals, user documentation and online help to overcome problems with design and production 3.2 Check presentation for spelling and consistency in presentation features and style, in accordance with task requirements 3.3 Print presentation materials in accordance with presenter or audience requirements 3.4 Store presentation, in accordance with organisational requirements and exit application without information loss or damage

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, 3.1, 3.2, 3.4	• Evaluates and integrates information and ideas to construct meaning in an effort to design and create a presentation
Writing	2.1, 2.3-2.5	• Communicates relationships between ideas and information in a style appropriate to audience and purpose in accordance with organisational and task requirements
Oral Communication	1.2	• Listens to discussions and participates in exchange of information to choose appropriate actions to create presentation

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Navigate the world of work	1.1-1.4, 2.1, 2.2, 2.5, 3.2-3.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2	• Collaborates with others to achieve joint outcomes
Get the work done	1.4, 2.1-2.5, 3.1-3.4	• Uses advanced features within applications to address routine and complex work tasks • Plans and implements routine tasks and workload making limited decisions on sequencing and timing

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU302 Create electronic presentations	BSBITU302B Create electronic presentations	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

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Assessment Requirements for BSBITU302 Create electronic presentations

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:

- adhere to organisational requirements and strategies when creating electronic presentations including:
  - ergonomic requirements
  - energy and resource requirements
- adhere closely to task requirements
  - following designated timelines
  - achieving consistency of design and layout
  - ensuring correct editing and style requirements
- use advanced software features
- communicate effectively with personnel
- print and store presentation.

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 provisions of relevant legislation, standards and codes that affect aspects of business operations
- explain how design features affect the readability and appearance of electronic presentations.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- office equipment and materials
- relevant software applications
- examples of electronic presentations
- style guides.

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

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BSBITU303 Design and produce text documents

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 design and develop text-based documents using advanced features of word processing software.

It applies to individuals who possess fundamental skills in computer operations and keyboarding, and basic skills in operation of word processing software. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own word processed documents.

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

Unit Sector

Information and Communications Technology – IT Use

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. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met 1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image
2. Design word processed documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task 2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout 2.3 Use style sheets and automatic functions to ensure consistency of design and layout
3. Add tables and other data	3.1 Insert a standard table into a document, changing cells to meet information requirements 3.2 Insert and delete columns and rows as necessary 3.3 Insert images and other data to meet required specifications
4. Produce text documents	4.1 Use advanced software functions to enable efficient production of documents 4.2 Enter or import, and edit text and other data to meet required specifications 4.3 Preview, adjust and print documents in accordance with organisational and task requirements 4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage 4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy 4.6 Use manuals, user documentation and online help to overcome problems with document design and production

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, 4.3, 4.4, 4.6	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements

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Writing	2.1-2.3, 3.3, 4.2-4.5	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements • Organises content to support purpose and audience of material using clear and logical language
Oral Communication	1.2	• Uses specific and direct language, and listening and questioning techniques to clarify requirements
Navigate the world of work	1.1-1.3, 2.1-2.3, 3.1, 3.3, 4.2-4.5	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2	• Collaborates with others to achieve joint outcomes
Get the work done	2.1-2.3, 3.1-3.3, 4.1-4.6	• Uses advanced features within applications to address routine and complex work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU303 Design and produce text documents	BSBITU303A Design and produce text documents	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

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Assessment Requirements for BSBITU303 Design and produce text documents

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:

- adhere to organisational requirements and strategies when creating text documents including:
  - ergonomic requirements
  - energy and resource requirements
- adhere closely to task requirements and required specifications by:
  - following designated timelines
  - achieving consistency of style and image
  - ensuring correct editing and style requirements
  - adhering to designated timelines
- use advanced software features
- communicate effectively with personnel
- overcome problems by referring to user documentation, manuals and online help.

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 various formatting styles and their impact on formatting, readability and appearance of documents
- explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- describe purpose and contents of an organisational style guide
- identify purpose, uses and functions of word processing software.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- office equipment and resources
- relevant software applications
- examples of correctly formatted text documents
- style guides.

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

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BSBITU304 Produce spreadsheets

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 spreadsheets through the use of spreadsheet software.

It applies to individuals employed in a range of environments who tend to be personally responsible for designing and working with spreadsheets under minimal supervision.

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

Unit Sector

Information and Communications Technology – IT Use

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. Select and prepare resources	1.1 Adhere to ergonomic, work organisation and occupational health and safety requirements 1.2 Use energy and resource conservation techniques to minimise wastage 1.3 Identify spreadsheet task requirements in relation to data entry, storage, output and presentation
2. Plan spreadsheet design	2.1 Ensure spreadsheet design suits purpose, audience and information requirements of task

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout 2.3 Use style sheets and automatic functions to ensure consistency of design and layout
3. Create spreadsheet	3.1 Ensure data is entered, checked and amended to maintain consistency of design and layout, in accordance with organisational and task requirements 3.2 Format spreadsheet using software functions to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements 3.3 Ensure formulae are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required 3.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production
4. Produce simple charts	4.1 Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements 4.2 Create charts using appropriate data range in spreadsheet 4.3 Modify chart type and layout using formatting features
5. Finalise spreadsheets	5.1 Preview, adjust and print spreadsheet and any accompanying charts, in accordance with task requirements 5.2 Ensure data input meets designated timelines and organisational requirements for speed and accuracy 5.3 Name and store spreadsheet in accordance with organisational requirements and exit application without data loss/damage

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, 3.1-3.4, 5.1	• Recognises and interprets numerical and textual information to determine organisational and task

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		requirements
Writing	2.1, 3.1-3.3, 4.2, 4.3, 5.1-5.3	• Inputs numerical and key reporting information when creating and finalising spreadsheets and uses format, layout, style guides and standard naming conventions to organise data according to purpose and audience
Oral Communication	3.3	• Participates in exchange of information to determine whether formulae utilised produce result required
Numeracy	4.1, 4.2	• Uses mathematical equations to create simple formulae and validate numerical data
Navigate the world of work	1.1-1.3, 2.1-2.3, 3.1-3.3, 4.1, 5.1-5.3	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	3.3	• Collaborates with others to achieve joint outcomes
Get the work done	2.1-2.3, 3.1-3.4, 4.1-4.3, 5.1-5.3	• Uses advanced features within applications to address routine and complex work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU304 Produce spreadsheets	BSBITU304A Produce spreadsheets	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

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Assessment Requirements for BSBITU304 Produce spreadsheets

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:

- design spreadsheets that address a range of data and organisational requirements
- use software functions, graphics and support materials to create spreadsheets
- apply knowledge of formatting requirements for workplace documents.

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 formatting requirements of workplace documents
- identify organisational guidelines on spreadsheet design and use
- explain organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- industry software packages
- computer user information
- relevant legislation and codes of practice
- organisational policies and procedures
- relevant workplace documentation and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBITU305 Conduct online transactions

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 range of online transactions, including banking, and buying and selling products and services.

It applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of conducting online transactions 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

Information and Communications Technology – IT Use

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. Identify and investigate online service provider	1.1 Undertake online research to identify suppliers of required products/services 1.2 Assess service provider confidentiality, security and privacy facilities in accordance with individual and organisational requirements 1.3 Assess potential products/services for authenticity

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ELEMENT	PERFORMANCE CRITERIA
2. Perform online transactions	2.1 Confirm organisational requirements for products/services to be obtained 2.2 Ensure authentication information is secured in accordance with organisational requirements 2.3 Use appropriate online functions to obtain required products/services 2.4 Report any difficulties in accessing or using online facilities to the service provider 2.5 Complete transaction and ensure products/services are received in accordance with terms of online transaction
3. Maintain records of online transactions	3.1 Maintain records of transactions in accordance with organisational policy, procedures and level of authority 3.2 Compare organisational records with online records and deal with irregularities according to organisational policy and procedures
4. Review online transactions	4.1 Review obtained products/services rendered to determine quality, timeliness and level of customer service in relation to advertised profile 4.2 Make recommendations regarding continued or future use of online service provider, as supported by transaction history

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	• Accesses a range of online information and contextualises to transaction requirements.
Reading	1.1-1.3, 2.2, 2.5, 3.1, 3.2, 4.1	• Recognises and interprets numerical information within online content and organisational requirements to establish and complete required tasks and determine quality of content
Writing	2.4, 3.1, 4.1, 4.2	• Ensures specific and relevant language is used to communicate required information, and information is accurately maintained

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Oral Communication	2.1, 2.4, 4.2	• Articulates requirements clearly using listening and questioning techniques to clarify and confirm understanding and delivers specific and factual information appropriate to audience and environment
Navigate the world of work	1.2, 2.1, 2.2, 2.5, 3.1, 3.2,	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	2.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.3, 2.3-2.5, 3.1, 3.2, 4.1, 4.2	• Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals • Recognises a range of familiar problems and seeks assistance from appropriate parties • Uses a range of online applications to access, filter and extract information and process transactions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU305 Conduct online transactions	BSBITU305A Conduct online transactions	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

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Assessment Requirements for BSBITU305 Conduct online transactions

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:

- adhere to organisational requirements when assessing an online service provider
- adhere to organisational requirements when performing online transactions including:
  - reporting faults to service provider
  - checking accuracy of products/services delivered
- maintain records according to organisational policy and procedures
- review effectiveness of online transactions.

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 provisions of relevant legislation that affect aspects of business operations
- explain policies and procedures relating to use of internet and online purchasing
- describe service provider requirements
- identify legal and ethical requirements relating to a range of online transactions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- office equipment and resources
- relevant software applications
- organisational policies and procedures.

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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

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BSBITU306 Design and produce business documents

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 design and produce various business documents and publications. It includes selecting and using a range of functions on a variety of computer applications.

It applies to individuals who possess fundamental skills in computer operations and keyboarding. 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

Information and Communications Technology – IT Use

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. Select and prepare resources	1.1 Select and use appropriate 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 Ensure document design is consistent with company and/or client requirements, using basic design principles

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Discuss and clarify format and style with person requesting document/publication
2. Design document	2.1 Identify, open and generate files and records according to task and organisational requirements 2.2 Design document to ensure efficient entry of information and to maximise presentation and appearance of information 2.3 Use a range of functions to ensure consistency of design and layout 2.4 Operate input devices within designated requirements
3. Produce document	3.1 Complete document production within designated timelines according to organisational requirements 3.2 Check document produced to ensure it meets task requirements for style and layout 3.3 Store document appropriately and save document to avoid loss of data 3.4 Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output 4.2 Make any modifications to document to meet requirements 4.3 Name and store document in accordance with organisational requirements and exit application without data loss/damage 4.4 Print and present document according to requirements

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, 2.2, 3.2, 3.4, 4.1	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements • Applies strategies to self-correct and verify clarity and conformity of information

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Writing	2.2, 2.3, 3.1, 4.2, 4.3	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements • Organises content to support purposes and audience of material, using clear and logical language
Oral Communication	1.4	• Confirms requirements with relevant personnel using specific terminology and listening and questioning techniques
Navigate the world of work	1.2, 1.3, 2.1, 2.4, 3.1, 3.2, 4.2-4.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.4	• Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts
Get the work done	1.1-1.3, 2.1-2.4, 3.1-3.4, 4.1-4.4	• Uses basic features and functions within applications to access, store, organise data and perform routine work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU306 Design and produce business documents	BSBITU306A Design and produce business documents	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

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Assessment Requirements for BSBITU306 Design and produce business documents

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 appropriate technology and software for design and production of business documents
- adhere to organisational requirements when:
  - selecting layout and style
  - opening and generating files
  - producing documents within designated timelines
  - naming and storing documents
  - printing and presenting documents
- adhere to task requirements when producing documents including:
  - applying basic design principles
  - applying consistent formatting
  - using appropriate styles
  - using correct layouts
  - proofreading as required
- use appropriate data storage options
- apply knowledge of functions and features of contemporary computer applications
- print and present completed documents.

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 appropriate technology for production requirements

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- describe functions and features of contemporary computer applications
- outline organisational policies, plans and procedures
- list organisational requirements for document design e.g. style guide.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- office equipment and resources
- relevant software applications
- examples of style guides
- organisational procedures.

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

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BSBITU307 Develop keyboarding speed and accuracy

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 keyboard skills with speed and accuracy using touch-typing techniques.

It applies to individuals who work in a range of environments and are required to enter text and data with speed and accuracy. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own word processed documents.

On successful completion of this unit, individuals must be assessed in accordance with the current version of AS 2708: 2001 and issued with a speed statement.

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

Unit Sector

Information and Communications Technology – IT Use

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. Use safe work practices	1.1 Adjust workspace, furniture and equipment to suit ergonomic requirements 1.2 Ensure work meets organisational and work health and safety

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ELEMENT	PERFORMANCE CRITERIA
	(WHS) requirements for computer operation
2. Identify and develop keyboard skills	2.1 Identify and apply keyboard functions for both alpha and numeric strokes 2.2 Apply touch-typing technique to complete tasks 2.3 Develop speed and accuracy in accordance with workplace requirements for level of responsibility
3. Check accuracy	3.1 Proofread document carefully to identify errors 3.2 Amend document, correct errors and complete a final accuracy check

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, 3.2	• Reviews information to be typed and recognises variations and inconsistencies with spelling and format
Writing	2.2, 2.3, 3.2	• Types numerical and textual information following a simple and defined format
Navigate the world of work	1.1, 1.2, 2.3,	• Recognises and adheres to legislative and organisational requirements and meets expectations associated with own role
Get the work done	2.1-2.3, 3.1, 3.2	• Utilises a broad range of features and functions within applications in performing routine and complex tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU307 Develop keyboarding speed	BSBITU307A Develop keyboarding speed and	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
and accuracy	accuracy	Training Packages	

Links

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

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Assessment Requirements for BSBITU307 Develop keyboarding speed and accuracy

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 keyboard speed and accuracy in accordance with workplace requirements
- apply ergonomic and work health and safety requirements
- accurately proofread documents.

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 provisions of work health and safety (WHS) legislation that impact developing keyboard skills
- outline ergonomic requirements applicable to developing keyboard skills.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant legislation
- relevant workplace documentation and resources
- industry software packages.

Individuals must be assessed in accordance with the current version of AS 2708: 2001 and issued with a speed statement.

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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

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BSBITU309 Produce desktop published documents

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 design and produce desktop published documents.

It applies to individuals who work in a range of environments, which may include providing administrative support within an enterprise, or who may be technical or knowledge experts responsible for production of their own documents.

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

Unit Sector

Information and Communications Technology – IT Use

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. Prepare to produce desktop published documents	1.1 Use safe work practices including addressing ergonomic requirements and using work organisation strategies 1.2 Use energy and resource conservation techniques 1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.4 Identify organisational and task requirements for desktop published documents to ensure consistency of style and image

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ELEMENT	PERFORMANCE CRITERIA
2. Set up desktop published document	2.1 Design content structure and layout to ensure information and graphics are arranged according to related topics and in logical sequences 2.2 Select appropriate formatting and create templates or master pages to ensure consistency of design and layout 2.3 Confirm layout with appropriate person
3. Create desktop published document	3.1 Prepare, format and enter required text 3.2 Import text from other applications and resolve any formatting issues 3.3 Scan or import graphics from other applications and resolve any formatting issues 3.4 Arrange text and graphics according to organisational and task requirements
4. Finalise desktop published document	4.1 Review text for possible errors and omissions, and resolve any issues 4.2 Check page order, structure and linkages 4.3 Produce completed document in required format 4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage 4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy 4.6 Use manuals, user documentation and online help to overcome problems with document design and production

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, 3.3, 3.4, 4.1, 4.2, 4.6	• Recognises and interprets diagrammatical and textual information from a range of sources to determine and adhere to requirements • Applies strategies to self-correct and verify clarity and

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		conformity of information
Writing	2.1, 2.2, 3.1-3.4, 4.1-4.3, 4.5	• Enters and amends routine data using a format appropriate to requirements • Develops documents using required format, accurate spelling and grammar, and organises content to support purpose and audience of material, using clear and logical language
Oral Communication	1.3, 2.3	• Confirms requirements with relevant personnel using specific terminology and listening and questioning techniques to confirm understanding
Navigate the world of work	1.3, 1.4, 2.1, 2.2, 3.4, 4.3-4.5	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.3, 2.3	• Collaborates with others to achieve joint outcomes
Get the work done	2.1, 2.2, 3.1-3.4, 4.1-4.6	• Recognises and responds to routine problems in context of own work • Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU309 Produce desktop published documents	BSBITU309A Produce desktop published documents	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

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Assessment Requirements for BSBITU309 Produce desktop published documents

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 organisational and safe work practices including:
  - ergonomic requirements
  - energy and resource conservation techniques
- adhere to organisational requirements by:
  - ensuring consistency of style and image
  - logically sequencing data
  - producing documents within designated timelines
  - naming and storing documents
- adhere to task requirements when producing documents including:
  - applying consistent formatting
  - using appropriate templates and master pages
  - using correct layouts
- resolve any issues including:
  - formatting issues
  - errors and omissions
  - problems with design or production
- use appropriate data storage options
- apply knowledge of functions and features of contemporary computer applications
- communicate with relevant personal.

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

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Knowledge Evidence

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

- identify energy and resource conservation techniques
- outline organisational requirements for ergonomics, work periods and breaks
- describe contents and purpose of organisational style guides
- explain purposes, uses and functions of desktop publishing software
- outline various formatting styles and their effect on formatting, readability and appearance of documents.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant workplace documentation and resources
- industry software packages and user instructions.

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

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BSBITU401 Design and develop complex text documents

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 design and develop business documents using complex technical features of word processing software.

It applies to individuals 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/knowledge 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

Information and Communications Technology – IT Use

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. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met 1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3 Identify organisational requirements for text-based business documents to ensure consistency of style and image 1.4 Evaluate complex technical functions of software for its

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ELEMENT	PERFORMANCE CRITERIA
	usefulness in fulfilling requirements of the task 1.5 Match document requirements with software functions to provide efficient production of documents
2. Design complex documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task 2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout 2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout 2.4 Use manuals, user documentation and online help to overcome problems with document design and production
3. Add complex tables and other data	3.1 Insert a standard table into document, changing cells to meet information requirements 3.2 Format rows and columns as required 3.3 Insert images and other data, formatting as required
4. Produce documents	4.1 Use complex operations to develop documents, and achieve required results 4.2 Preview, adjust and print documents in accordance with organisational and task requirements 4.3 Name and store documents in accordance with organisational requirements and exit application without information loss/damage 4.4 Prepare documents within designated timelines and for speed and accuracy

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, 2.4, 4.3, 4.4	• Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues

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Writing	2.1-2.4, 3.3, 4.2-4.4,	• Develops material using required format and incorporating technical functions to meet business needs
Oral Communication	1.2	• Uses specific and relevant language to confirm understanding of requirements and listens carefully to verbal instructions and discussions
Numeracy	1.4, 3.3	• Recognises and inputs numerical information according to requirements
Navigate the world of work	1.1-1.3, 1.5, 2.1-2.3, 3.1-3.3, 4.1-4.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2	• Collaborates with others to achieve joint outcomes
Get the work done	1.4, 1.5, 2.1-2.4, 3.1-3.3, 4.1-4.4	• Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps • Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU401 Design and develop complex text documents	BSBITU401A Design and develop complex text documents	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

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Assessment Requirements for BSBITU401 Design and develop complex text documents

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 organisational and safe work practices including:
  - ergonomic requirements
  - energy and resource conservation techniques
- 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
- resolve issues by referring to user documentation and online help
- use appropriate data storage options
- apply knowledge of complex operation and functions of industry software applications
- communicate with relevant personal.

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 various formatting styles and their effect on formatting, readability and appearance of documents
- explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- describe purpose and contents of an organisational style guide.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant workplace documentation and resources
- industry software packages and user instructions.

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

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BSBITU402 Develop and use complex spreadsheets

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 use spreadsheet software to complete business tasks and produce complex documents.

It 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

Information and Communications Technology – IT Use

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. Prepare 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 organisational and task requirements of data entry, storage, output, reporting and presentation requirements 1.4 Apply work organisation strategies and energy and resource

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ELEMENT	PERFORMANCE CRITERIA
	conservation techniques to plan work activities
2. Develop a linked spreadsheet solution	2.1 Utilise spreadsheet design software functions and formulae to meet identified requirements 2.2 Link spreadsheets in accordance with software procedures 2.3 Format cells and use data attributes assigned with relative and/or absolute cell references, in accordance with task specifications 2.4 Test formulae to confirm output meets task requirements
3. Automate and standardise spreadsheet operation	3.1 Evaluate tasks to identify those where automation would increase efficiency 3.2 Create, use and edit macros to fulfil requirements of task and automate spreadsheet operation 3.3 Develop, edit and use templates to ensure consistency of design and layout for forms and reports, in accordance with organisational requirements
4. Use spreadsheets	4.1 Enter, check and amend data in accordance with organisational and task requirements 4.2 Import and export data between compatible spreadsheets and adjust host documents, in accordance with software and system procedures 4.3 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production 4.4 Preview, adjust and print spreadsheet in accordance with organisational and task requirements 4.5 Name and store spreadsheet in accordance with organisational requirements and exit application without data loss or damage
5. Represent numerical data in graphic form	5.1 Determine style of graph to meet specified requirements and manipulate spreadsheet data if necessary to suit graph requirements 5.2 Create graphs with labels and titles from numerical data contained in a spreadsheet file 5.3 Save, view and print graph within designated timelines

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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, 2.3, 2.4, 3.1, 3.3, 4.1-4.5, 5.1, 5.2	• 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	2.1-2.4, 3.2, 3.3, 4.1, 4.2, 4.4, 4.5, 5.2, 5.3	• Uses formal mathematical language to create formulas and enters routine data using a format appropriate to requirements • Develops material using syntactic structure, required format and incorporating technical functions to meet business needs
Oral Communication	1.2	• Uses listening and questioning skills to clarify requirements
Numeracy	2.1-2.4, 3.2, 4.1, 4.2, 5.2	• Represents mathematical information in an alternative form and analyses information to determine required spreadsheet formulae and macros
Navigate the world of work	1.1, 1.3, 1.4, 2.1-2.4, 3.2, 3.3, 4.1, 4.2, 4.4, 4.5, 5.1, 5.3	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	1.2, 1.4, 2.1-2.4, 3.2, 3.3, 4.1-4.5, 5.1-5.3	• Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps • Uses formal thinking techniques to generate new ideas • Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU402 Develop and use complex	BSBITU402A Develop and use	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
spreadsheets	complex spreadsheets	Training Packages	

Links

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

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Assessment Requirements for BSBITU402 Develop and use complex spreadsheets

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 organisational and safe work practices including:
  - ergonomic requirements
  - energy and resource conservation techniques
- adhere to organisational requirements for:
  - ensuring consistency of style, design and layout
  - saving and printing 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
- evaluate tasks to improve efficiency
- apply knowledge of functions and features of contemporary computer applications
- communicate with relevant personnel.

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 advanced functions of spreadsheet software applications
- describe impact of formatting and design on presentation and readability of data

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- explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant workplace documentation and resources
- industry software packages and user instructions.

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

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BSBITU404 Produce complex desktop published documents

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 design and produce complex desktop published documents.

This unit applies to individuals employed in a range of work environments who require well-developed skills in desktop publishing. They may be individuals providing administrative support within an enterprise, or others responsible for production of their own documents.

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

Unit Sector

Information and Communications Technology – IT Use

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. Prepare to produce desktop published documents	1.1 Use safe work practices including addressing ergonomic requirements and using work organisation strategies 1.2 Use energy and resource conservation techniques 1.3 Identify document purpose, audience, presentation and final output requirements, and clarify with relevant personnel as required 1.4 Identify organisational and task requirements for desktop

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ELEMENT	PERFORMANCE CRITERIA
	published documents to ensure consistency of style and image
2. Design desktop published documents	2.1 Design document to enhance readability and appearance, according to organisational and task requirements 2.2 Determine document type and assess production and design requirements 2.3 Set up and use master pages, templates and styles to ensure consistency of design and layout 2.4 Set up colour palettes according to organisational and task requirements
3. Create desktop published documents	3.1 Prepare, format and enter required text 3.2 Import text from other applications and resolve any formatting issues 3.3 Scan or import graphics from other applications and resolve any formatting issues 3.4 Use complex software functions to arrange text and graphics on page, according to organisational and task requirements
4. Finalise desktop published documents	4.1 Ensure pages and combined graphics and text are composed correctly, to suit organisational and task requirements 4.2 Check numerical sequencing and layout of document is correct, to meet binding and finishing requirements 4.3 Incorporate bleed allowance in margins and borders
5. Produce desktop published documents	5.1 Review text for possible errors and omissions, and resolve any issues 5.2 Produce completed document in line with required final output 5.3 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage 5.4 Prepare text documents within designated timelines and organisational requirements for speed and accuracy 5.5 Use manuals, user documentation and online help to overcome problems with document design and production

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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, 2.2, 3.1-3.4, 4.1, 4.2, 4.5, 5.1, 5.2	• Evaluates and integrates information and ideas to construct meaning, to design, set up and create a published document, and review final document for possible errors and other issues
Writing	2.1, 2.2, 3.1-3.4, 5.1-5.5	• Communicates relationships between ideas and information in a style appropriate to audience and purpose in accordance with organisational and task requirements
Oral Communication	1.3, 1.4	• Uses everyday language and listens to short specific instructions to clarify document purpose, audience and presentation requirements with appropriate personnel
Numeracy	4.2, 4.3	• Uses basic numeracy calculations to deal with margin bleeding and arranges sequential numerical information during process of finalising document.
Navigate the world of work	1.1, 1.3, 1.4, 2.1-2.4, 3.4, 4.1, 4.2, 5.2-5.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.3	• Collaborates with others to achieve joint outcomes
Get the work done	2.1, 2.3, 2.4, 3.1-3.4, 4.1-4.3, 5.1-5.5	• Recognises and responds to routine problems in context of own work • Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU404 Produce complex desktop published documents	BSBITU404A Produce complex desktop published documents	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBITU404 Produce complex desktop published documents

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 organisational and safe work practices including:
  - ergonomic requirements
  - energy and resource conservation techniques
- adhere to organisational requirements for:
  - ensuring consistency of style and image
  - logically sequencing data
  - producing documents within designated timelines
  - naming and storing documents
- adhere to task requirements when producing documents including:
  - applying consistent formatting
  - using appropriate templates and master pages
  - using appropriate colour palettes
  - using correct layouts
  - providing bleed allowance
  - meeting binding and finishing requirements
- resolve any issues including:
  - formatting issues
  - errors and omissions
  - problems with design and production.

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

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Knowledge Evidence

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

- outline various formatting styles and their effect on formatting, readability and appearance of documents
- explain organisational requirements for ergonomics, work periods and breaks, and energy and resource conservation techniques
- identify purposes, uses and functions of desktop publishing software
- describe purpose and contents of an organisational style guide.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the information and communications technology – IT use field of work and include access to:

- organisational policies and procedures
- relevant workplace documentation and resources
- industry software packages and user instructions.

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

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BSBLDR401 Communicate effectively as a workplace leader

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 communicate effectively as a workplace leader, including understanding the context, choosing methods of communication to suit the audience, and following up.

This 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

Management and Leadership - Leadership

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. Identify context for communication	1.1 Identify reason and context for communication 1.2 Identify persons relevant to the communication context 1.3 Clarify specific environment and personnel factors that may impact on the success of the communication

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify and clearly understand the desired outcome of the communication 1.5 Evaluate available methods of communication against their suitability for the specific communication requirements 1.6 Identify potential barriers to effective communication and develop solutions to minimise impact 1.7 Incorporate relevant business policies, procedures, regulations and legislation into communication processes
2. Clarify message and engage communication	2.1 Undertake communication using media and format relevant to the context 2.2 Incorporate respectful and positive approaches to communications 2.3 Employ two-way processes to ensure receipt and acknowledgement of message 2.4 Seek feedback on communication processes from all parties 2.5 Provide opportunities to clarify and confirm understanding
3. Take follow-up actions	3.1 Maintain record of the communication process and outcomes in line with enterprise policy and procedures 3.2 Identify follow up actions and communicate to relevant persons 3.3 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	Performance Criteria	Description
Reading	1.7, 3.1, 3.2, 3.3	• Analyses and evaluates textual information from a range of sources to inform communication processes
Writing	2.1, 3.1	• Plans and prepares workplace documentation for relevant stakeholders according to organisational formats
Oral Communication	2.1, 3.2	• Participates in a variety of spoken exchanges with a range of audiences using structure and language to suit

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		the audience
Navigate the world of work	1.7, 3.1	• Adheres to organisational policies and procedures relevant to own role
Interact with others	1.3, 2.1, 2.2, 2.3, 2.4, 2.5	• 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
Get the work done	1.1, 1.2, 1.4, 1.5, 1.6, 3.1, 3.2, 3.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR401 Communicate effectively as a workplace leader	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

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Assessment Requirements for BSBLDR401 Communicate effectively as a workplace leader

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 the context for communication and adjust approach and responses accordingly
- create and present clear messages choosing method and mode appropriate to the audience and context undertake effective two-way communication from the perspective of a team leader
- identify and record actions required as a result of communication and follow-up in a timely manner.

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:

- list effective management communication characteristics
- describe a range of electronic and non-electronic communication methods, including situations where they would or would not be used
- describe the characteristics of effective listening techniques
- explain feedback process and methods
- identify team leadership communication responsibilities
- explain barriers to communication in a workplace context
- describe verbal and non-verbal communication characteristics
- explain the impact of legislation and organisational policies on workplace communication.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBLDR402 Lead effective workplace relationships

Modification History

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

Application

This unit defines 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.

This 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 and evaluation and leadership and guidance of others.

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

Unit Sector

Management and Leadership - Leadership

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. Collect, analyse and communicate information and ideas	1.1 Collect relevant information from appropriate sources and analyse and share with the work team to improve work performance 1.2 Communicate ideas and information in a manner which is appropriate and sensitive to the cultural and social diversity of the

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ELEMENT	PERFORMANCE CRITERIA
	audience and any specific needs 1.3 Lead consultation processes to encourage employees to contribute to issues related to their work, and promptly relay feedback to the work team in regard to outcomes 1.4 Seek and value contributions from internal and external sources in developing and refining new ideas and approaches 1.5 Implement processes to ensure that issues raised are resolved promptly or referred to relevant personnel as required
2. Develop trust and confidence as leader	2.1 Treat all internal and external contacts with integrity, respect and empathy 2.2 Use the organisation's social, ethical and business standards to develop and maintain effective relationships 2.3 Gain and maintain the trust and confidence of colleagues, customers and suppliers through competent performance 2.4 Adjust interpersonal styles and methods to meet organisation's social and cultural environment 2.5 Lead and encourage other members of the work team to follow examples set according to organisation's policies and procedures
3. Develop and maintain networks and relationships	3.1 Use networks to identify and build relationships 3.2 Use networks and other work relationships to provide identifiable benefits for the team and organisation
4. Manage difficulties into positive outcomes	4.1 Identify and analyse difficulties and take action to rectify the situation within the requirements of the organisation and relevant legislation 4.2 Guide and support colleagues to resolve work difficulties 4.3 Regularly review and improve workplace outcomes in consultation with relevant personnel 4.4 Manage poor work performance within the organisation's processes 4.5 Manage conflict constructively within the organisation's processes

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1	• Collects, analyses and evaluates textual information from a range of resources to inform improvement strategies
Oral Communication	1.2, 1.3, 2.4, 2.5, 4.2	• Selects or adjusts communication style to maintain effectiveness of interaction and build and maintain engagement consistent with organisational requirements
Navigate the world of work	2.2, 2.5, 4.1, 4.4, 4.5	• Recognises and follows legislative and organisational requirements relevant to own role
Interact with others	1.1-1.4, 2.1, 2.3, 2.5, 3.1, 3.2, 4.2, 4.5	• 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
Get the work done	1.1, 1.5, 4.1, 4.3	• Plans and implements activities and processes to manage and review work performance • Systematically gathers and analyses all relevant information to formulate and evaluate possible solutions to difficulties

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLDR402 Lead effective workplace relationships	BSBWOR401A Establish effective workplace relationships	Updated to meet Standards for Training Packages Title change Minor edits to clarify intent of performance criteria	Equivalent unit

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Links

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Assessment Requirements for BSBLDR402 Lead effective workplace relationships

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 and analyse information to achieve planned outcomes
- apply techniques for resolving problems and conflicts and dealing with poor performance within organisational and legislative requirements
- review and improve workplace outcomes in consultation with relevant personnel
- 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.

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 how work relationships, and the cultural and social environment, can support or hinder achieving planned outcomes
- explain techniques for developing positive work relationships and building trust and confidence in a team including interpersonal styles, communications, consultation, cultural and social sensitivity, networking
- explain the impact of legislation and organisational policies on workplace relationships
- describe a range of methods and techniques for communicating information and ideas to a range of stakeholders
- outline problems solving methods

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- explain methods to resolve workplace conflict
- explain methods to manage poor work performance
- explain how to monitor, analyse and introduce ways to improve work relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBLDR403 Lead team effectiveness

Modification History

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

Application

This unit defines skills, knowledge and outcomes required to plan and supervise the performance of the team and develop team cohesion.

It 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

Management and Leadership - Leadership

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. Plan to achieve team outcomes	1.1 Lead the team to identify, establish and document team purpose, roles, responsibilities, goals, plans and objectives in consultation with team members 1.2 Engage team members to incorporate innovation and

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ELEMENT	PERFORMANCE CRITERIA
	productivity measures in work plans 1.3 Lead and support team members in meeting expected outcomes
2. Lead team to develop cohesion	2.1 Provide opportunities for input of team members into planning, decision making and operational aspects of work team 2.2 Encourage and 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 to encourage, value and reward individual and team efforts and contributions 2.4 Recognise and address issues, concerns and problems identified by team members or refer to relevant persons as required 2.5 Model expected behaviours and approaches
3. Participate in and facilitate work team	3.1 Actively encourage team members to participate in and take responsibility for team activities and communication processes 3.2 Give the team support to identify and resolve problems which impede its performance 3.3 Ensure own contribution to work team serves as a role model for others and enhances the organisation's image within the work team, the organisation and with clients/customers
4. Liaise with management	4.1 Maintain open communication with line manager/management at all times 4.2 Communicate information from line manager/management to the team 4.3 Communicate unresolved issues, concerns and problems raised by the team/team members to line manager/management and ensure follow-up action is taken 4.4 Communicate unresolved issues, concerns and problems related to the team/team members raised by line managers/management to the team and ensure follow-up to action is taken

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

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	Criteria	
Writing	1.1, 4.2	• Prepares workplace plans that communicate intent and elicits feedback clearly and effectively
Oral communication	1.1, 1.3, 2.2, 2.3, 3.1, 3.2, 4.2-4.4	• Engages in discussions or provides information using structure and language appropriate to the audience and situation
Interact with others	1.1-1.3, 2.1-2.5, 3.1, 3.3, 4.1	• 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
Get the work done	1.1-1.3, 3.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR403 Lead team effectiveness	BSBWOR402A Promote team effectiveness	Updated to meet Standards for Training Packages Title change Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBLDR403 Lead team effectiveness

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 knowledge of organisational goals, objectives and plans
- develop a team work plan including documentation of how it was generated and how it will be monitored
- identify and incorporate innovation and productivity measures into a team work plan
- communicate with team members and management to identify and establish the team purpose, roles, responsibilities, goals plans and objectives and resolve problems
- use techniques to consult, encourage, support and provide feedback to team members
- model team leadership behaviours and approaches
- liaise with management to develop the teamwork plan, resolve issues and ensure follow-up action is taken.

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 principles and techniques associated with:

- delegation and work allocation
- goal setting
- group dynamics and processes
- individual behaviour and difference
- leadership styles
- motivation
- negotiation
- problem solving
- planning

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- workplace innovation
- workplace productivity.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- information about the organisation, including organisational structure, goals, objectives and plans
- case studies, and where possible, real situations
- workplace equipment and resources
- 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

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BSBLDR404 Lead a diverse workforce

Modification History

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

Application

This unit identifies the behaviours, skills and knowledge required to lead a diverse workforce. It covers identifying, analysing 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

Management and Leadership - Leadership

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. Identify the dimensions of workforce diversity	1.1 Establish the nature of diversity in the business context 1.2 Qualify and quantify the source of workforce diversity 1.3 Identify the benefits provided to the business through the diverse workforce 1.4 Recognise legislation, regulation and enterprise policy and procedure that impacts on workplace diversity

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Identify opportunities and barriers to inclusive engagement
2. Factor diversity into team plans and operations	2.1 Develop and review work plans in line with the diversity context 2.2 Incorporate the positive contribution of diverse workforce members into work plans 2.3 Adjust plans and operations to align with relevant legislation and policy and procedure 2.4 Design processes to incorporate and maximise the benefits of diversity
3. Engage with a diverse workforce	3.1 Apply communication processes, behaviours and language in line with diversity context 3.2 Recognise and adapt for own bias and assumptions 3.3 Practise inclusive behaviours 3.4 Recognise and apply actions to ensure cultural competency 3.5 Incorporate and apply diversity tools and techniques to operations
4. Support and encourage diverse workforce members	4.1 Provide workplace support and access to enabling services 4.2 Encourage, review and provide feedback to the workforce on a continuous 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
Writing	2.2, 2.3	• Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information, requirements and recommendations in accordance with legal and organisational requirement
Oral Communication	1.1	• Establishes understanding through questioning and active listening
Navigate the world of work	1.4, 2.3	• Appreciates the implications of legislation, policy and other organisational responsibilities in carrying out

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		own role
Interact with others	3.1-3.3, 3.5	• 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
Get the work done	1.1-1.3, 1.5, 2.4, 3.4, 3.5	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR404 Lead a diverse workforce	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

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Assessment Requirements for BSBLDR404 Lead a diverse workforce

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 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
- demonstrate communication style and methods that encourage inclusion identifying and compensating for own bias and assumptions
- develop work plans that integrate a diverse workforce, adjusting plans and operations to meet legislation, regulations and policy
- structure continuous feedback and review processes into team 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 legislation, regulation and business policy and procedures relevant to diversity in the workplace
- explain the origins and types of diverse groups/persons in the workplace
- give examples of strategies, tools and techniques for integrating and engaging a diverse workforce
- explain the potential impacts of gender, race, age, disability, sexual orientation, form of work engagement and flexible work arrangement on workforce engagement
- identify benefits to business of having a diverse workforce and barriers to inclusive engagement.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- legislation and regulations related to workforce diversity
- workplace policies and procedures related to working with diversity
- interaction with others
- 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

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BSBLDR501 Develop and use emotional intelligence

Modification History

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

Application

This unit covers the development and use of emotional intelligence to increase self-awareness, self-management, social awareness and relationship management in the context of the workplace.

It includes identifying the impact of own emotions on others in the workplace, recognising and appreciating the emotional strengths and weaknesses of others, promoting the development of emotional intelligence in others and utilising emotional intelligence to maximise team outcomes.

It applies to managers who identify, analyse, synthesise and act on information from a range of sources and who deal with unpredictable problems. 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

Management and Leadership - Leadership

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. Identify the impact of own emotions on others in	1.1 Identify own emotional strengths and weaknesses 1.2 Identify personal stressors and own emotional states related to

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ELEMENT	PERFORMANCE CRITERIA
the workplace	the workplace 1.3 Develop awareness of own emotional triggers and use this awareness to enable control emotional responses 1.4 Model workplace behaviours that demonstrate management of emotions 1.5 Use self-reflection and feedback from others to improve development of own emotional intelligence
2. Recognise and appreciate the emotional strengths and weaknesses of others	2.1 Respond to the emotional states of co-workers and assess emotional cues 2.2 Identify the varying cultural expressions of emotions are utilise to respond to emotional cues in a diverse workforce 2.3 Demonstrate flexibility and adaptability in dealing with others 2.4 Take into account the emotions of others when making decisions
3. Promote the development of emotional intelligence in others	3.1 Provide opportunities for others to express their thoughts and feelings 3.2 Assist others to understand the effect of their behaviour and emotions on others in the workplace 3.3 Encourage the self-management of emotions in others 3.4 Encourage others to develop their own emotional intelligence to build productive relationships and maximise workplace outcomes
4. Utilise emotional intelligence to maximise team outcomes	4.1 Encourage a positive emotional climate in the workplace 4.2 Use the strengths of workgroup members to achieve workplace outcomes

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
Interact with others	1.1-1.5, 2.1- 2.4, 3.3, 3.4, 4.1, 4.2	• Reflects on 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

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		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
Get the work done	3.1, 3.2	• Leads processes to develop, implement and monitor plans and processes to ensure team engagement and effectiveness

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR501 Develop and use emotional intelligence	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

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Assessment Requirements for BSBLDR501 Develop and use emotional intelligence

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 the impact of own emotions on others by identifying own emotional strengths and weaknesses, stressors, emotional states and triggers and gathering feedback from others
- model behaviours that demonstrate management of emotions
- recognise and respond to the emotional states of others promote the development of emotional intelligence in 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:

- explain emotional intelligence principles and strategies
- describe the relationship between emotionally effective people and the attainment of business objectives
- explain how to communicate with a diverse workforce which has varying cultural expressions of emotion
- explain the use of emotional intelligence in the context of building workplace relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- 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

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BSBLDR502 Lead and manage effective workplace relationships

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 and manage effective workplace relationships.

It applies to individuals in leadership or management who have a prominent role in establishing and managing processes and procedures to support workplace relationships taking into account the organisation's values, goals and cultural diversity.

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

Management and Leadership - Leadership

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. Manage ideas and information	1.1 Ensure strategies and processes are in place to communicate information associated with the achievement of work responsibilities to all co-workers 1.2 Develop and/or implement consultation processes to ensure that

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ELEMENT	PERFORMANCE CRITERIA
	employees have the opportunity to contribute to issues related to their work role 1.3 Facilitate feedback to employees on outcomes of the consultation processes 1.4 Develop and/or implement processes to ensure that issues raised are resolved promptly or referred to relevant personnel
2. Establish systems to develop trust and confidence	2.1 Establish and/or implement policies to ensure that the organisation's cultural diversity and ethical values are adhered to 2.2 Gain and maintain the trust and confidence of colleagues and external contacts through professional conduct 2.3 Adjust own interpersonal communication styles to meet the organisation's cultural diversity and ethical environment and guide and support the work team in their personal adjustment process
3. Manage the development and maintenance of networks and relationships	3.1 Use networks to build workplace relationships providing identifiable outcomes for the team and the organisation 3.2 Conduct ongoing planning to ensure that effective internal and external workplace relationships are developed and maintained
4. Manage difficulties to achieve positive outcomes	4.1 Develop and/or implement strategies to ensure that difficulties in workplace relationships are identified and resolved 4.2 Establish processes and systems to ensure that conflict is identified and managed constructively in accordance with the organisation's policies and procedures 4.3 Provide guidance, counselling and support to assist co-workers in resolving their work difficulties 4.4 Develop and implement an action plan to address any identified difficulties

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
Writing	1.2, 1.4, 2.1, 4.1, 4.2, 4.4	• Prepares plans and policies incorporating appropriate vocabulary, grammatical structure and conventions

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Interact with others	2.2, 2.3, 3.1, 4.3	• Adapts personal communication style to model behaviours, build trust and positive working relationships, and to support others • Plays a lead role in situations requiring effective collaboration, demonstrating high level support and facilitation skills and ability to engage and motivate others
Navigate the world of work	2.1, 2.3	• Establishes or follows organisational policy regarding diversity and ethical conduct
Get the work done	1.1-1.4, 2.1, 3.2, 4.1, 4.2, 4.4	• Takes responsibility for formulating, organising and implementing plans, processes and strategies that impact the workplace • Systematically gathers and analyses all relevant information and evaluates options to inform decisions about organisational strategies • Evaluates outcomes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR502 Lead and manage effective workplace relationships	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

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Assessment Requirements for BSBLDR502 Lead and manage effective workplace relationships

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/or implement processes to manage ideas and information 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
  - resolution of issues raised or referral to relevant personnel
- establish and/or implement policies to ensure that the organisation’s cultural diversity and ethical values are adhered to
- provide leadership through own behaviour including:
  - professional conduct that promotes trust with internal and external contacts
  - adjusting own interpersonal communication style to meet the organisation’s cultural diversity and ethical environment
- plan for, and manage, the use of networks to support identifiable outcomes for the team and the organisation
- develop and/or implement processes and systems to manage difficulties 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.

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:

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- explain how systems, policies and procedures can support the development of effective work relationships focusing on interpersonal styles, communications, consultation, cultural and social sensitivity, networking and conflict resolution
- outline legislation relevant to managing effective workplace relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBLDR503 Communicate with influence

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 present and negotiate persuasively, lead and participate in meetings and make presentations to customers, clients and others.

It applies to managers and leaders who identify, analyse, synthesise and act on information from a range of sources, and who deal with unpredictable problems. 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

Management and Leadership - Leadership

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. Communicate clearly	1.1 Confirm the authority or mandate to present business views or position 1.2 Respect protocols and confidentiality of information 1.3 Clarify the audience information needs and prepare a position 1.4 Use language that is appropriate for the audience 1.5 Use active listening to seek stakeholder and other organisation

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ELEMENT	PERFORMANCE CRITERIA
	input and achieve a balanced exchange of views 1.6 Seek immediate feedback to ensure that the views expressed by all stakeholders have been understood
2. Present and negotiate persuasively	2.1 Identify key individuals and target groups for their value to advance the business interests 2.2 Prepare realistic positions and supporting arguments in advance in anticipation of the likely expectations and tactics of others 2.3 Respect values, concerns and views of others and keep lines of communication open 2.4 Acknowledge differences of opinion to encourage the rigorous examination of all options 2.5 Use a variety of communication styles to present business positions to best effect 2.6 Seek mutually beneficial solutions by establishing areas of common ground and potential compromise 2.7 Keep negotiations focused on key issues and moving forward towards a final resolution 2.8 Adhere to agreements in order to maintain the credibility and trust of others
3. Participate in and lead, meetings effectively	3.1 Identify the need for meetings and program meetings in response to the need 3.2 Use an agenda and efficient, inclusive meeting procedures to maximise participation and maintain order 3.3 Prepare summaries of key issues and possible options disseminated in advance 3.4 Achieve agreed outcomes in the available time by co-operating with and seeking consensus and compromise 3.5 Outcomes of meetings are promptly summarised for action and distributed to stakeholders, as required
4. Make presentations at meetings, forums and conferences	4.1 Select appropriate forums to present business positions to best effect 4.2 Obtain reliable information and advice to prepare appropriate presentations. 4.3 Adapt language, explanations, media and information/entertainment balance to meet the needs of the audience 4.4 Respond to questions openly and honestly

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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
Writing	2.2, 3.3, 3.5, 4.2	• Prepares documentation that accurately summarises key findings or outcomes for own use and for distribution to others • Prepares presentations appropriate to audience needs, context and purpose
Oral Communication	1.4, 1.5, 1.6, 2.5	• Selects appropriate and engaging vocabulary adjusting language and presentation features to maintain effectiveness of interaction • Uses active listening and questioning to seek information and confirm understanding
Navigate the world of work	1.2	• Understands the implications of legal and ethical responsibilities to maintain confidentiality
Interact with others	1.1-1.6, 2.3, 2.4, 2.8, 4.3, 4.4	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals • Selects and uses appropriate conventions and protocols when communicating with team members • Adapts personal communication style to 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 negotiation and collaboration, demonstrating high level conflict resolution skills and ability to engage and motivate others
Get the work done	2.1, 2.2, 2.6, 3.1-3.5, 4.1, 4.2	• Plans, organises and implements complex tasks required to achieve required outcomes • Uses analytical processes to evaluate options, and aid in problem-solving and decision-making

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLDR503 Communicate with influence	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

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Assessment Requirements for BSBLDR503 Communicate with influence

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:

- negotiate and present persuasively
- communicate clearly with business associates, client groups and others to position the business to best effect including listening actively, understanding the information needs of others and adapting communication to suit the audience
- prepare for, participate in, and lead meetings to obtain outcomes
- prepare and make presentations to groups of people including:
  - identifying suitable forums for presentations
  - presenting reliable information
  - designing the presentation to meet the needs of the audience
  - answering questions.

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 business and organisational protocols for the release of information and communicating internally or externally
- explain the requirements to maintain confidentiality in the workplace
- identify industry, media and government organisations, events and communication channels relevant to the organisation
- demonstrate principles of cross-cultural communication
- explain principles of negotiation, mediation, conflict resolution and incident de-escalation
- describe structured and inclusive meeting procedures.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBLDR504 Implement diversity in the workplace

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 diverse workforce. It covers scoping workforce diversity and developing, implementing and reviewing diversity policy and procedures in the workplace.

It applies to managers within a diverse workforce environment who exercise significant discretion and autonomy within a structured business context. They identify, analyse, synthesise and act on information from a range of sources, and deal with unpredictable problems. 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

Management and Leadership - Leadership

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. Scope workforce diversity	1.1 Establish the nature of diversity in the industry sector, community and workplace 1.2 Qualify and quantify the sources of diversity in the industry sector, community and workplace

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Research and identify the benefits of having a diverse workforce 1.4 Identify and analyse legislation, regulation and enterprise policy that impacts on workplace diversity 1.5 Research and identify opportunities and barriers to inclusive engagement
2. Integrate diversity into workplace operations	2.1 Develop and review workplace policies, procedures and planning in accordance with the scope of diversity 2.2 Establish where diversity integration meets the needs of the enterprise and diverse persons 2.3 Review existing policies, plans and procedures to identify areas where diversity can achieve positive impact 2.4 Monitor and review workplace processes to guide implementation
3. Implement diversity across the workplace	3.1 Consult with management and teams to champion the diversity implementation 3.2 Ensure work teams incorporate diversity processes into work activity 3.3 Establish and enable enterprise and individual support processes 3.4 Provide for training and coaching in diversity implementation 3.5 Promote and model inclusive behaviours
4. Review and evaluate diversity in the workplace	4.1 Conduct regular reviews of diversity integration with relevant persons 4.2 Evaluate workplace diversity against workplace policies, procedures and planning objectives 4.3 Identify and recommended improvements to diversity integration

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, 1.5, 2.1, 2.3	• Collects, analyses, compares and evaluates textual information from a range of resources to inform planning

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Writing	2.4	• Researches, plans and prepares workforce plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions
Navigate the world of work	1.4	• Recognises, understands and applies applicable legislation and organisational policies and procedures in the context of own work and workforce planning
Interact with others	3.1, 3.2, 3.5	• Selects and uses appropriate conventions and protocols when communicating with team members • Selects and uses appropriate conventions and protocols to seek feedback • Adapts personal communication style to model behaviours, build trust and positive working relationships and to show respect for diversity
Get the work done	1.1, 2.1, 2.2, 3.3, 3.4, 4.1-4.3	• Takes responsibility for planning effective strategies, sequencing and prioritising tasks to achieve efficient and effective outcomes • Applies problem solving processes to identify risks, evaluate options and determine solutions • Reviews plans and evaluates outcomes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**E/N**
BSBLDR504 Implement diversity in the workplace	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

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Assessment Requirements for BSBLDR504 Implement diversity in the workplace

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 diversity, current and potential, within the industry sector, community and workplace
- research and apply relevant legislation, regulation and business policies that impact on the diverse workforce
- review and apply workplace policies, procedures and plans to identify opportunities for improved inclusiveness and diversity
- monitor, review and evaluate processes in the workplace relevant to diversity issues
- support and encourage workplace diversity
- act inclusively with a diverse workforce
- champion the benefits of diversity within the workplace.

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 origin and nature of diversity within the industry sector, community and the workplace
- outline the legislative and regulatory context of the organisation relevant to workplace diversity
- explain how organisation's policies and procedures relate to diversity
- give examples of barriers to inclusive engagement in a diverse workforce and possible strategies to address them
- describe inclusive behaviours that support diversity integration.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace policies, procedures and plans relevant to diversity
- relevant legislation, regulations, standards and codes
- 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

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BSBLDR801 Lead personal and strategic transformation

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 analyse and improve personal leadership style and professional competence and to 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.

It 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

Management and Leadership - Leadership

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. Reflect on personal efficacy	1.1 Identify and apply strategies to create a climate that encourages and allows for the receiving and giving of constructive feedback 1.2 Regularly review own performance in terms of personal efficacy,

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ELEMENT	PERFORMANCE CRITERIA
	personal competence and attainment of professional competence outcomes and personal development objectives and priorities 1.3 Review own capacity as a role model in terms of ability to build trust, confidence and respect of diverse groups and relevant individuals 1.4 Evaluate personal effectiveness in building an effective organisational and workplace culture 1.5 Analyse and evaluate personal effectiveness in developing the competence required to achieve operational accountabilities and responsibilities
2. Lead in a transformational manner	2.1 Apply transformational and transactional leadership practices 2.2 Demonstrate empathy in personal communication, relationships and day to day leadership role 2.3 Lead consistently in an inclusive manner that is respectful of individual differences 2.4 Monitor and regulate own potentially disruptive emotions and impulses 2.5 Manage work based relationships effectively 2.6 Integrate own emotions with cognitions in personal leadership style 2.7 Evaluate personal leadership style and adjust for different contexts
3. Model and cultivate collaborative thinking	3.1 Apply judgement, intelligence and common sense when undertaking day to day leadership role 3.2 Analyse relevant legislation, information and intelligence sources when evaluating business opportunities 3.3 Draw upon personal expertise of self and relevant individuals to achieve strategic results 3.4 Seek and encourage contributions from relevant individuals 3.5 Model and encourage collaborative communication and learning approaches in the workplace 3.6 Cultivate existing and new collaborative and participative work relationships
4. Provide strategic leadership during change processes	4.1 Positively convey organisational direction and values to relevant individuals and relevant stakeholders 4.2 Analyse the impact and role of leadership during organisational change

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ELEMENT	PERFORMANCE CRITERIA
	4.3 Analyse and confirm capacity and competence of relevant individuals to contribute to change processes and plans 4.4 Develop learning and communication solutions to address problems and risks arising for individuals during organisational change 4.5 Identify leadership styles and develop approaches to best respond to the impact of change on people 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	Performance Criteria	Description
Learning	1.2	• Develops insights from previous experience to improve personal performance
Reading	1.1, 1.2, 3.2, 4.5	• Sources, evaluates and critiques ideas and information from a range of complex texts to assist with decisions, choices and to manage organisational requirements
Writing	1.1, 1.5, 4.4, 4.5	• Records results of analysis using clear and comprehensible language and layout • Researches and prepares plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions
Oral communication	2.2, 2.3, 3.4	• Expresses opinions and information and responds to other people's views using language appropriate to audience
Navigate the world of work	1.4, 1.5, 3.2, 3.3	• Considers own role in terms of its contributions to broader goals of the work environment • Takes full responsibility for identifying and following policies, procedures and legislative requirements
Interact with others	1.1-1.5, 2.1-2.7, 3.1, 3.4-3.6, 4.1	• Understands impact of own behaviour on others, reflecting on personal strengths and limitations and implementing strategies to regulate behaviour • Influences and fosters a collaborative culture facilitating a sense of commitment and workplace cohesion • Uses a variety of communication tools and strategies to build rapport and maintain effective working

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		relationships • Uses appropriate interpersonal skills to encourage contributions and elicit ideas from others • Adapts personal communication style to build a positive working relationship and show respect for the opinions, values and particular needs of others
Get the work done	1.1, 2.1, 4.2, 4.3, 4.4, 4.5	• 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 all relevant information and evaluates options to inform decisions with the potential to affect organisational outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR801 Lead personal and strategic transformation	BSBLED701A Lead personal and strategic transformation	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLDR801 Lead personal and strategic transformation

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:

- reflect on and improve own development, personal leadership style and self-management skills
- demonstrate the application of leadership styles and approaches appropriate to individuals involved, the outcomes being sought and the context
- model and encourage collaboration
- provide strategic leadership during a change process
- effectively manage workplace relationships
- analyse relevant legislation, information and intelligence 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:

- outline the relevant legislative and regulatory context of the organisation
- state the organisation's mission, purpose and values
- outline organisation's objectives, plans and strategies
- describe a range of leadership styles
- describe personal development planning methodologies
- outline data collection methods
- explain the process for external environment scanning relating to social, political, economic and technological developments
- explain emotional intelligence and its relationship to individual and team effectiveness
- explain organisational transformation and the management of the stages of change
- explain organisational design and building in responsiveness of operations to change in customer or market conditions.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- legislation, regulations and codes of practice
- workplace plans, mission statements, policies and procedures
- 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

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BSBLDR802 Lead the strategic planning process for an 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 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 is applied in order to engage people with the organisation's vision and goals and in developing and implementing the plan.

It 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

Management and Leadership - Leadership

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Initiate the strategic planning process	1.1 Consult organisation's decision makers to determine the parameters that will be used for the planning process, including timeframes and budget 1.2 Analyse current strategic planning documents to determine a methodology that is in keeping with the organisation's needs and past practice 1.3 Identify stakeholders who will contribute to the plan's development 1.4 Develop and document planning methodology within a project plan including resource allocation
2. Conduct an environmental and organisational scan	2.1 Research local and international best practice and trends in the organisation's field of operation 2.2 Identify, collect and analyse demographic and trend data to provide profiling information about the organisation's market. 2.3 Collect and analyse industry intelligence relating to competitors 2.4 Identify key strengths, weaknesses, opportunities and threats (SWOT) to the organisation 2.5 Identify major risk factors that could constrain the achievement of organisational goals in the short, medium and long term 2.6 Consult stakeholders to identify issues and expectations affecting the organisation's operations
3. Lead the establishment of organisational key directions and goals	3.1 Engage staff and relevant stakeholders in establishing the major goals of the organisation 3.2 Establish leadership to articulate the vision, mission and key goals of the organisation 3.3 Provide leadership to establish the organisation's key result areas
4. Lead the development of the plan's key activities and performance indicators	4.1 Initiate and manage processes and delegations to develop detailed activities to achieve the organisation's goals 4.2 Develop specific performance indicators to enable the measurement of success 4.3 Cost and budget for resourcing levels to enable the plan to be enacted 4.4 Gain commitment to the process and the plan 4.5 Engage relevant stakeholders and participants to sign off and commit to the finalised strategic plan
5. Manage the	5.1 Develop tactical or operational annual plans to facilitate

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ELEMENT	PERFORMANCE CRITERIA
implementation process	implementation of longer-term strategic plan 5.2 Prioritise and resource (human, financial and capital) programs and operational tactics 5.3 Analyse and plan for changes to processes or practices 5.4 Plan human resource development and succession strategies to ensure long-term business viability 5.5 Initiate strategies to skill the workforce in order to implement the plan 5.6 Establish communication processes to inform and support staff and stakeholders through implementation of the plan
6. Manage the evaluation process	6.1 Establish and implement processes to monitor performance against agreed benchmarks and performance 6.2 Monitor outcomes of the strategic and operational plans 6.3 Undertake review or refinement of activities in light of changing conditions to ensure the attainment of the strategic plan goals

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, 2.1-2.5, 5.3, 6.2, 6.3	• 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	1.4, 4.1, 4.2, 5.1, 5.3, 5.4, 6.1, 6.2, 6.3	• Develops or reviews complex texts according to organisational requirements to convey strategy, context and intent
Oral communication	1.1, 2.6	• Leads discussions using active listening and questioning to seek the views and opinions of others
Numeracy	1.4, 2.2, 4.3	• Develops budgets and plans using mathematical processes to calculate costs, timeframes and resources
Navigate the	1.2, 3.2, 3.3, 5.1,	• Develops and implements strategies to ensure organisational goals are achieved

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world of work	5.4, 5.5	• Leads planning processes in accordance with organisational goals
Interact with others	1.1, 2.6, 3.1-3.3, 4.4, 4.5	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals • Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others
Get the work done	1.2, 1.3, 1.4, 3.1, 4.1, 4.2, 4.4, 4.4, 5.2-5.4, 5.6, 6.1-6.3	• Systematically gathers and analyses all relevant information and evaluates options in order to inform strategic decisions or solve problems • Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands • Monitors results against stated goals, adjusting plans and resources where necessary

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR802 Lead the strategic planning process for an organisation	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

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Assessment Requirements for BSBLDR802 Lead the strategic planning process for an 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:

- facilitate processes to develop an organisation-wide strategic plan including:
  - consulting with decision makers and other stakeholders
  - planning and budgeting for human, financial and capital resources and implementing staff development and succession plans
  - identifying and analysing information about the organisation and its environment including research about industry trends and practices, an environmental and organisational scan, existing organisational strategic planning documents, a strengths, weaknesses, opportunities and threats (SWOT) analysis and identifying risks to achieving the organisation's goals
  - aligning the strategic plan to the vision, mission and key goals of the organisation
  - identifying performance indicators
  - communicating with and engaging stakeholders in the development, sign off and implementation of the plan
- harness resources, staff and stakeholder commitment to ensure implementation of the strategic plan by consulting and engaging with them throughout the process
- implement and evaluate the strategic plan including developing tactical or operational annual plans and refining the plan to respond to changed conditions.

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 contractual requirements and implications for the business
- explain financial management requirements and processes of the business
- describe industry trends and practices of relevance to the organisation's strategic direction

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- specify organisational resource requirements to undertake projects
- describe processes and procedures for identifying strategic goals setting and activities
- describe risk management processes such as SWOT
- outline strategic and operational planning processes

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- organisational and industry information and data
- workplace documents including strategic planning documentation
- case studies and, where available, 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

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BSBLDR803 Develop and cultivate collaborative partnerships and relationships

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 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.

It 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 or certification requirements apply to this unit at the time of publication.

Unit Sector

Management and Leadership - Leadership

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. Communicate to influence relevant	1.1 Generate trust, confidence and support from relevant stakeholders by demonstrating a high standard of personal

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ELEMENT	PERFORMANCE CRITERIA
individuals and stakeholders	performance and conduct 1.2 Implement communication strategies to represent the organisation positively to media, local community and stakeholders 1.3 Make decisions in consultation with relevant stakeholders and relevant individuals where appropriate 1.4 Use a range of influencing strategies to increase commitment from staff and stakeholders to achieve organisational requirements and to contribute to desired culture 1.5 Undertake selected community and/or professional engagements that project a positive image of the organisation to the broader community and stakeholders
2. Cultivate new and existing partnerships with stakeholders	2.1 Establish outcomes to be achieved from the partnership 2.2 Analyse and apply models for effective consultation and collaboration within partnerships 2.3 Cultivate collaborative communities and partnerships through application of a range of communication solutions 2.4 Forge relationships, collaborative communities or partnerships between organisations
3. Establish positive collaborative relationships	3.1 Establish processes that contribute to the creation and maintenance of a positive culture that embraces collaboration 3.2 Establish processes to resolve conflict in a fair, equitable and collaborative manner 3.3 Organise and allocate work activities in a cost effective and equitable manner with clear, quantifiable and agreed performance standards 3.4 Encourage staff to undertake activities that develop their personal competence and performance 3.5 Empower individuals to develop their own ways of working within agreed boundaries of competence, cultural, diversity and organisational and legal requirements 3.6 Establish indicators and feedback processes that can be used to evaluate the health of the work environment
4. Lead establishment of a partnership program	4.1 Identify and address relevant organisational policies and procedures in partnership plans 4.2 Identify and incorporate relevant legal requirements into planning 4.3 Form partnerships using collaborative and consultative processes

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ELEMENT	PERFORMANCE CRITERIA
	involving public and/or private sector enterprises 4.4 Plan and allocate resource requirements to accomplish a partnership program 4.5 Establish relevant organisational policies and procedures relating to partnerships
5. Establish reporting mechanisms for partnership program	5.1 Establish reporting systems for reporting results against planned partnership outcomes 5.2 Implement reporting systems to map progress against partnership outcomes

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	• Sources, evaluates and critiques ideas and information from a range of complex texts
Writing	2.1, 3.1, 3.2, 3.6, 4.4, 4.5, 5.1	• 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	2.3, 3.4, 4.3	• 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	3.3	• Selects and uses familiar mathematical techniques to determine costs and benefits associated with strategic resource decisions
Navigate the world of work	3.5, 4.1, 4.2	• 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
Interact with others	1.1, 1.4, 2.3, 2.4, 3.2, 3.4, 4.3	• Plays a lead role in building effective collaboration and trust, demonstrating high level conflict resolution skills and ability to engage and motivate others

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		• Identifies and uses a variety of appropriate conventions and protocols when communicating with colleagues and external stakeholders
Get the work done	1.2, 1.3, 1.5, 2.1, 3.1, 3.3, 3.6, 4.4, 5.2	• Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands • Monitors agreed outcomes and required indicators

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR803 Develop and cultivate collaborative partnerships and relationships	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

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Assessment Requirements for BSBLDR803 Develop and cultivate collaborative partnerships and relationships

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:

- demonstrate and model skills and knowledge to foster partnerships, conduct stakeholder consultation and use strategic and personally enhancing communication skills
- develop collaborative approaches to enhance individual, team and organisational outcomes
- initiate and implement partnerships in line with relevant regulatory, employment 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 the legislative and regulatory context of the organisation
- outline the organisation's mission, purpose, values, objectives and strategies
- explain techniques that cultivate collaborative relationships and partnerships
- describe data collection methods
- explain the external context including social, political, economic and technological developments
- explain emotional intelligence and its relationship to individual and team effectiveness
- explain organisational transformation and the management of the stages of change.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

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- relevant legislation, regulations, standards and codes
- workplace documents including business strategic plans, policies and procedures
- 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

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BSBLDR804 Influence and shape diversity 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 influence and shape the development of organisational culture, structures and processes to maximise the strategic advantages of a diverse workforce. It includes influencing organisational culture, providing strategic direction in diversity management and formulating strategic diversity priorities.

It applies to individuals 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

Management and Leadership - Leadership

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. Influence organisational culture	1.1 Adopt a leadership position which reflects understanding of the strategic advantage of diversity to the organisation 1.2 Embed diversity strategies and performance indicators into organisational strategies, policies and senior management performance agreements

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Develop, support and resource initiatives to attract and advance the position of equity groups within the organisation 1.4 Embed diversity education in induction, on-the-job learning and professional development opportunities 1.5 Recruit, develop and deploy staff with a range of attributes that are reflective of a diverse workforce 1.6 Monitor, identify and celebrate organisational culture, working relationships, business outcomes and client feedback for positive diversity achievements
2.Provide strategic direction in diversity management	2.1 Research, analyse and communicate future trends and issues that may impact upon workplace diversity to senior management, business unit and line managers 2.2 Model and promote different leadership styles 2.3 Identify the current and future diversity needs of the organisation and initiate strategies to address gaps 2.4 Keep key stakeholders informed, in a manner suited to their needs, of what constitutes good practice in the area of diversity management and its potential impact on the organisation.
3.Formulate strategic diversity priorities for the organisation	3.1 Formulate strategic priorities in consultation with key stakeholders in the organisation and the community, and set out a shared vision for the future that provides challenging but realistic objectives 3.2 Identify strategic priorities and embed them in performance measures to encourage staff to be creative and innovative in their approach to attaining the organisation's diversity objectives 3.3 Communicate strategic priorities to stakeholders using a variety of strategies tailored to their needs and purposes and in such a way as to attract their support 3.4 Monitor implementation to ensure strategic diversity priorities are addressed 3.5 Engage stakeholders to contribute to the evaluation of outcomes 3.6 Monitor and continue, enhance or replace strategies, based on feedback and supporting organisational data.

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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	• Sources, evaluates and critiques ideas and information from a range of complex texts
Writing	1.2, 1.4, 3.1	• Develops texts dealing with complex concepts using specialised and detailed language to convey strategy, context, intent and organisational requirements
Navigate the world of work	1.2, 1.5, 2.3, 3.1, 3.2	• Takes a lead role in the development of organisational goals, roles and responsibilities • Leads the development of and adherence to organisational policies and procedures that are compliant with government policy and legal requirements
Interact with others	1.1, 2.2, 2.4, 3.1, 3.3, 3.5	• Identifies and uses a variety of appropriate conventions and protocols when communicating with colleagues and external stakeholders • Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others • Understands all aspects of diversity and integrates diversity into the work context, for managing change, making decisions and achieving shared outcomes
Get the work done	1.3, 1.4, 1.5, 1.6, 2.3, 3.2, 3.4	• Develops flexible plans for complex, high impact activities with strategic implications that involve diverse stakeholders with potentially competing demands • Monitors agreed outcomes and required indicators

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLDR804 Influence and shape diversity management	Not applicable	New unit	No equivalent unit

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Links

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

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Assessment Requirements for BSBLDR804 Influence and shape diversity 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:

- research, analyse and communicate legislation, regulations and initiatives for diversity
- work with stakeholders to develop and communicate a shared vision and strategic priorities for managing diversity
- integrate diversity policies and procedures within and across all human resource, management and operational functions and areas of the business including strategic plans and key performance indicators, policies and procedures, training, and recruitment
- develop, support and resource initiatives to attract and advance equity groups including identifying and celebrating success, and modelling different leadership styles
- monitor and review diversity priorities and 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:

- explain how diversity policy and initiatives apply within human resource, management and other operational functions and areas
- explain diversity, including issues of racism, sexism, ageism, ethnicity, sexual orientation, religious beliefs, physical and intellectual abilities, gender, culture, religion, discrimination, harassment and victimisation
- outline the legislative and regulatory context of the organisation with reference to equal employment opportunity, equity and diversity
- develop organisation-specific proposals for taking action on diversity and outline how these proposals can convince the organisation's senior management
- give examples of the critical influence of organisational culture on the success of diversity objectives

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- describe the nature of cultural change and the influence that can be exerted when cultural change is initiated from the higher echelons of management
- describe the positive relationships between strategic management of diversity and the organisation's core business and strategic goals.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- organisational and industry information and data
- examples of strategic planning documents
- equity, diversity and equal opportunity legislation and regulations
- case studies and, where available, 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

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BSBLDR805 Lead and influence change

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 organisational leadership in change management through influencing and shaping an organisational culture that is receptive to and embraces the opportunities for change.

The unit includes influencing organisational culture, anticipating change and providing strategic leadership in change management.

It 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

Management and Leadership - Leadership

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. Influence organisational culture	1.1 Undertake a strategic review of organisational culture to establish existing attitudes to change and identify key issues for action

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Identify, support and actively promote the strategic advantages of ongoing change for individuals, groups and the organisation to foster commitment to workplace change 1.3 Embed the acceptance of new ideas and management methods and challenges to existing practices and structures in managerial practice and decision making 1.4 Embed change management activities and related performance indicators for managers in organisational strategies, policies and plans as an ongoing requirement 1.5 Recruit, develop and deploy staff with a range of attributes that are reflective of a diverse workforce to maximise the organisation's strategic advantage in dealing with change 1.6 Embed learning and development opportunities for managing change in induction and professional development
2. Anticipate change	2.1 Identify the likelihood of significant change for the organisation through strategic networking and ongoing consideration of factors impacting upon the community, the industry, the organisation or within the external environment 2.2 Consult key stakeholders in identifying external drivers for change, and analyse likely change in relation to its potential effect on organisational purpose, functions, structure, strategic objectives and the people in the organisation 2.3 Undertake early planning with managers, human resource personnel and staff to ensure maximum lead time and support for those likely to be affected by change, and to allow thoughtful, proactive responses to be generated 2.4 Anticipate and plan for resourcing challenges of both implementing and sustaining change in accordance with organisational policies, procedures guidelines and legislative requirements
3. Provide strategic leadership in change management	3.1 Formulate strategic priorities in consultation with key stakeholders in the organisation and the community, and set out a vision for the future that provides challenging but realistic objectives to address change and maximise outcomes 3.2 Research and use current best practice information on change management to ensure change is managed effectively for sustained positive outcomes 3.3 Use leadership strategies to assist others to deal with ambiguity and to be creative and innovative in their approaches to dealing with change

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ELEMENT	PERFORMANCE CRITERIA
	3.4 Design strategies to address the transition from present to future arrangements and provide guidance for dealing with ambiguity in roles, functions, organisational priorities or structures 3.5 Monitor organisational culture, business outcomes and client feedback and identify and celebrate positive achievements in accordance with organisational policy

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, 3.2	• Sources, evaluates and critiques ideas and information from a range of complex texts
Writing	1.6, 3.1	• Develops texts dealing with complex concepts using specialised and detailed language to convey strategy context, intent and organisational requirements
Navigate the world of work	2.4, 3.1	• Leads planning and resource allocation processes which are in accordance with organisational policies and procedures and legal requirements
Interact with others	2.2, 3.1	• Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others
Get the work done	1.1-1.6, 2.1, 2.3, 2.4, 3.2-3.5	• Accepts responsibility for planning and sequencing complex tasks and workload • Monitors progress of plans and agreed outcomes • Systematically gathers and analyses relevant information and evaluates options to inform decisions about complex organisational strategies

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLDR805 Lead and influence change	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

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Assessment Requirements for BSBLDR805 Lead and influence change

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 and implement a strategic review of organisational culture in an organisation and develop a vision for the future
- research and anticipate the likelihood of change for the organisation
- identify, support and promote the advantages of change to stakeholders by communication, role modelling and celebrating success
- embed change management into organisational policies, procedures and practices including recruitment, training, procurement and resourcing
- implement and monitor change management in a continuous improvement cycle.

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 change management models and current best practice
- give examples of change management leadership strategies
- outline the effects of change and ways to ensure strategic advantage
- list the key factors driving change in the internal and external operating environment of the business and community
- outline organisational goals, policies, procedures and guidelines relevant to change management
- outline the relevant legislative and regulatory context of the organisation as it relates to change management.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- organisational and industry information and data
- workplace documents including examples of strategic planning documents
- case studies and, where available, real situations
- interactions 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

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BSBLDR806 Lead and influence ethical practice

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 ethical leadership and take responsibility for influencing ethical practice. It addresses modelling organisational values, embedding ethical practice into the organisation's culture and processes and promoting ethical leadership and decision making at all levels of the organisation.

It 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

Management and Leadership - Leadership

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. Embody and model ethical values	1.1 Consistently demonstrate a commitment to the professionalism, ethical values and principles of the organisation in personal dealings within and on behalf of the organisation 1.2 Develop and maintain a high level of expertise related to ethics and standards

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Interpret complex ethical matters and provide advice to resolve them in accordance with legislative, industry codes of practice and organisational standards 1.4 Report and encourage dealing with suspected unethical conduct confidentially and promptly
2. Embed ethical practice into the organisation's culture and processes	2.1 Identify strengths, weaknesses and threats to ethical conduct in the organisation through analysis of industry, state, national and international trends and develop strategies to act on them in accordance with enterprise and industry practice 2.2 Analyse management and accountability structures in the organisation and put strategies in place to ensure continuous improvement 2.3 Influence the development and review of policies and procedures to include and address ethical considerations 2.4 Develop and promote frameworks for ethical decision-making and policy setting 2.5 Analyse and develop policies and procedures to allow individuals to safely report breaches of ethical conduct and for remedying breaches of ethical conduct
3. Promote ethical leadership and decision making at all levels of the organisation	3.1 Foster dialogue on organisational values and ethics with and between staff to develop a strong understanding of and commitment to organisational standards 3.2 Provide leadership and guidance to empower individuals and the organisation to address ethical issues 3.3 Identify and refer organisational patterns, trends and issues that require ethical consideration by managers and staff for action 3.4 Promote and support leadership programs that promote ethical and values-based behaviour according to organisational requirements and the individual needs and capabilities of staff

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

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Reading	2.1-2.3, 2.5	• Sources, evaluates and critiques ideas and information from a range of complex texts
Writing	2.2-2.5	• Develops texts dealing with complex concepts using specialised and detailed language to convey context and intent
Navigate the world of work	1.1-1.4, 2.3, 3.2, 3.4	• 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
Interact with others	1.3, 1.4, 3.1, 3.2	• Plays a lead role in situations requiring effective collaborative skills, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others
Get the work done	2.1, 2.2, 2.3, 2.4, 3.3, 3.4	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLDR806 Lead and influence ethical practice	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

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Assessment Requirements for BSBLDR806 Lead and influence ethical practice

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:

- lead and influence ethical practice in an organisation by demonstrating a personal commitment to the professionalism, ethical values and principles of the organisation and encouraging others to do so
- research and maintain a high level of ethical expertise including the ability to interpret complex ethical matters and provide advice
- report and deal with suspected unethical conduct confidentially and promptly
- research, develop and implement policies and procedures for managing ethical practices in an organisation
- promote ethical leadership and decision making including providing leadership and reviewing ethical practices.

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 national and international trends in the development of ethical organisations
- describe frameworks for ethical decision making/problem solving and policy setting
- explain organisational ethics, values and standards
- outline the role of organisational codes of ethics/conduct
- explain procedural fairness
- outline procedures, strategies or protocols that can be used to identify and address unethical conduct
- outline the legislative and regulatory context of the organisation, as it relates to ethical work practices.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- legislation, regulations and workplace standards relevant to ethical practice
- workplace documents, including organisational strategic plans and policies and procedures
- 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

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BSBLED101 Plan skills development

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 and document current skills and plan future skills development under the guidance of an appropriate adviser.

It applies to individuals developing basic skills and knowledge of career planning and skills development 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

Workforce Development – Learning and Development

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. Seek advice on future career directions	1.1 Identify possible career directions in industry or organisation 1.2 Identify and prioritise personal work goals 1.3 Discuss future work/career directions with appropriate people and identify additional skill requirements 1.4 Take into account personal values and attitudes regarding work and business in planning future work/career directions 1.5 Identify additional skills required, and determine appropriate method/s to acquire these skills

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ELEMENT	PERFORMANCE CRITERIA
2. Conduct self-assessment of skills	2.1 Identify work, life and study experiences relating to business 2.2 Assess current skills, knowledge and attitudes against a checklist of relevant competencies 2.3 Discuss results of self-assessment with trainer or assessor 2.4 Identify further skills development needs
3. Prepare portfolio of evidence	3.1 Identify and discuss types of evidence required 3.2 Develop a clear understanding of purpose of evidence 3.3 Collect examples of evidence for portfolio 3.4 Complete application for recognition of current competency and/or personal resume with assistance of assessor

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	1.3, 2.4	• Reflects on knowledge and experience required to broaden future skills development
Reading	1.1, 1.2, 1.5, 2.2, 2.4, 3.2-3.4	• Recognises and interprets textual information to determine requirements
Writing	1.2, 1.4, 1.5, 2.1, 2.2, 2.4, 3.1, 3.3, 3.4	• Uses factual information and industry-related terminology to complete required workplace documentation
Oral Communication	1.3, 1.5, 2.3, 2.4, 3.1, 3.4	• Uses everyday language and listens to short, specific advice to identify career options and personal work goals
Navigate the world of work	1.1-1.5, 2.1-2.4, 3.1, 3.2	• With assistance, identifies specific qualifications, experience and/or skills needed for current or desired work role • With encouragement, seeks feedback on self-assessment results from a trusted source
Interact with others	1.3, 1.4, 2.3, 3.2, 3.4	• Begins to recognise how personal values and beliefs align with, or differ from others in specific work contexts

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		• With encouragement, may ask questions to seek information or clarify instructions
Get the work done	3.2, 3.3, 3.4	• Plans and implements routine tasks directly related to own requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED101 Plan skills development	BSBLED101A Plan skills development	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

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Assessment Requirements for BSBLED101 Plan skills development

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 and seek advice from appropriate people on:
  - work/career options
  - results of self-assessment
  - preparation of portfolio
- prepare a portfolio of evidence including:
  - evidence examples
  - resume
  - recognition of current competencies application.

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 importance of skills development in career planning terms
- identify sources of advice on career planning and skill development
- outline types of evidence and ways of creating portfolios of evidence.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- interaction with others
- examples of resumes and career planning 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

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BSBLED301 Undertake e-learning

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 learning using electronic and communication technologies. It relates to the identification of learning needs and opportunities, and development of an e-learning plan.

It applies to individuals who undertake self-directed or self-managed approaches to learning.

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

Unit Sector

Workforce Development – Learning and Development

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. Identify learning needs	1.1 Identify personal learning needs and skill gaps through self-assessment 1.2 Self-assess learning factors related to e-learning and identify any support required to optimise e-learning outcomes 1.3 Identify and prioritise required outcomes from e-learning in accordance with individual, team and organisational requirements
2. Identify e-learning opportunities	2.1 Assess, in consultation with management, range of suitable e-learning opportunities in accordance with identified learning

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ELEMENT	PERFORMANCE CRITERIA
	outcomes, available technology, time and budgetary requirements 2.2 Examine e-learning content, materials and online methodology to determine quality, applicability and acceptability to individual and organisational requirements 2.3 Determine blended training solutions in accordance with organisational requirements where e-learning opportunities alone are insufficient to meet personal learning needs
3. Develop an e-learning plan	3.1 Negotiate inclusion of agreed e-learning opportunities and timeframes in learning plans in accordance with individual and organisational needs 3.2 Negotiate and include time required to access e-learning opportunities in learning plans 3.3 Prepare, and obtain management agreement for learning plans and required resources 3.4 Negotiate with management for recognition of competencies developed through e-learning
4. Undertake e-learning	4.1 Agree renegotiated workload and deadlines with management to provide for allocation of e-learning time in accordance with agreed e-learning plan and budgetary requirements 4.2 Undertake e-learning in accordance with e-learning plan and manage contingencies when unforeseen circumstances arise 4.3 Manage integration of work and learning in accordance with e-learning plan and organisational requirements
5. Review e-learning	5.1 Evaluate e-learning experience in terms of its applicability to individual learning style and individual/organisational satisfaction with process and outcomes 5.2 Consider advantages and disadvantages of e-learning and make recommendations regarding participation in future e-learning where necessary 5.3 Review and adjust individual e-learning plan in accordance with individual requirements and organisational needs

Foundation Skills

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

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Skill	**Performance Criteria**	**Description**
Learning	1.1, 1.2	• Reflects on knowledge and experience required to broaden and reinforce learning using self-evaluation to improve own working methods
Reading	1.3, 2.1-2.3, 4.1, 4.3, 5.3	• Compares several pieces of information to form an opinion, and determine and adhere to requirements
Writing	1.3, 3.1-3.4, 4.1, 5.1, 5.3	• Records key outcomes in a sequential manner using correct spelling, grammar and format appropriate for reference purposes • Develops material for a specific audience using clear and detailed language to convey explicit information and requirements
Oral Communication	2.1, 3.1-3.4, 4.1	• Articulates instructions and requirements clearly and exchanges information through listening and questioning • Uses simple and relevant language to confirm understanding of requirements
Numeracy	2.1, 3.1, 3.2, 4.1	• Performs calculations required to estimate timeframes and budgetary requirements
Navigate the world of work	1.3, 2.3	• Recognises and responds to organisational procedures and protocols
Interact with others	2.1, 3.1-3.4, 4.1	• Collaborates with others to negotiate agreed outcomes
Get the work done	1.2, 1.3, 2.1, 2.2, 3.1-3.3, 4.1-4.3, 5.1, 5.2, 5.3	• Takes responsibility for planning and organising own workload, identifying ways to prioritise and sequence tasks • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Evaluates outcomes of decisions to identify opportunities for improvement • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts • Establishes and maintains online connections with others, using a variety of digital tools and media to interact and collaborate • Investigates the use of digital technologies as learning tools

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED301 Undertake e-learning	BSBLED301A Undertake e-learning	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

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Assessment Requirements for BSBLED301 Undertake e-learning

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 and prioritise personal learning needs by determining skill gaps through self-assessment
- conform to organisational requirements when:
  - determining outcomes of e-learning
  - determining suitability of e-learning
  - developing e-learning plan
  - integrating work and learning
  - evaluating and reviewing e-learning experience and outcomes
- collaboratively examine and identify suitable e-learning/blended learning opportunities
- manage contingencies and adhere to timeframes.

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 differences between blended learning and e-learning
- outline relevant e-learning programs or methodologies
- outline factors that could affect an individual's capacity to be successful with e-learning
- explain the support requirements when implementing e-learning
- outline organisational learning and development requirements
- describe how to assess personal competency.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- business technology with software suitable for online learning tasks
- organisational policies and procedures
- workplace documents and
- case studies and, where available, 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

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BSBLED401 Develop teams and individuals

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 individual and team development needs and to facilitate the development of the workgroup.

It 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

Workforce Development – Learning and Development

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. Determine development needs	1.1 Systematically identify and implement learning and development needs in line with organisational requirements 1.2 Ensure that a learning plan to meet individual and group training and development needs is collaboratively developed, agreed to and implemented 1.3 Encourage individuals to self-evaluate performance and identify areas for improvement 1.4 Collect feedback on performance of team members from relevant

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ELEMENT	PERFORMANCE CRITERIA
	sources and compare with established team learning needs
2. Develop individuals and teams	2.1 Identify learning and development program goals and objectives, ensuring a match to the specific knowledge and skill requirements of competency standards relevant to the industry 2.2 Ensure that learning delivery methods are appropriate to the learning goals, the learning style of participants, and availability of equipment and resources 2.3 Provide workplace learning opportunities, and coaching and mentoring assistance to facilitate individual and team achievement of competencies 2.4 Create development opportunities that incorporate a range of activities and support materials appropriate to the achievement of identified competencies 2.5 Identify and approve resources and time lines required for learning activities in accordance with organisational requirements
3. Monitor and evaluate workplace learning	3.1 Use feedback from individuals or teams to identify and implement improvements in future learning arrangements 3.2 Assess and record outcomes and performance of individuals/teams to determine the effectiveness of development programs and the extent of additional development support 3.3 Negotiate modifications to learning plans to improve the efficiency and effectiveness of learning 3.4 Document and maintain records and reports of competency 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	Performance Criteria	Description
Learning	1.1-1.4, 2.1-2.4, 3.1, 3.3	• 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

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Reading	1.1, 1.2, 1.4, 2.1, 2.2, 2.4, 2.5, 3.1-3.4	• Analyses textual information from a range of sources to identify organisational requirements • Analyses information from a range of sources to evaluate performance
Writing	1.1, 1.2, 1.4, 2.1, 2.5, 3.1-3.4	• Develops materials to suit the requirements of different roles and individuals in the organisation • Maintains records using correct technical and organisational vocabulary
Oral Communication	1.2, 1.3, 1.4, 2.3, 3.1, 3.3	• 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
Navigate the world of work	1.1, 2.5, 3.4	• Recognises and responds to explicit and implicit organisational procedures and protocols Understands how own role meshes with others and contributes to broader goals
Interact with others	1.2, 1.3, 1.4, 2.2, 2.3, 3.1, 3.3	• Selects and uses appropriate conventions and protocols when communicating with co-workers in a range of work contexts • 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 joint/agreeable outcomes playing an active role in facilitating consensus in potentially contentious situations
Get the work done	1.1, 1.2, 1.4, 2.1, 2.2, 2.3, 2.5, 3.1, 3.2, 3.4	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED401	BSBLED401A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
Develop teams and individuals	Develop teams and individuals	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

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Assessment Requirements for BSBLED401 Develop teams and individuals

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:

- systematically identify and implement learning opportunities for others
- collect feedback on team and individual performance
- give and receive feedback from team members to encourage participation in and effectiveness of the team
- collaboratively develop learning plans to match skill needs of individuals and groups
- provide mentoring and coaching assistance to teams and individuals
- monitor and review workplace learning.

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 facilitation techniques to encourage team development and improvement
- outline organisational policies, plans and procedures for developing teams
- identify career paths and competency standards relevant to the industry.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- office equipment and resources
- learning and development plans, policies and procedures
- case studies and, where available, real situations

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- 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

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BSBLED501 Develop a workplace learning 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 encourage and support the development of a learning environment in which work and learning come together. Particular emphasis is on the development of strategies to facilitate and promote learning and to monitor and improve learning performance.

It applies to individuals who have a prominent role in encouraging, supporting and facilitating 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

Workforce Development – Learning and Development

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. Create learning opportunities	1.1 Identify potential formal and informal learning opportunities 1.2 Identify learning needs of individuals in relation to the needs of

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ELEMENT	PERFORMANCE CRITERIA
	the team and/or enterprise and available learning opportunities 1.3 Develop and implement learning plans as an integral part of individual and team performance plans 1.4 Develop strategies to ensure that learning plans reflect the diversity of needs 1.5 Ensure organisational procedures maximise individual and team access to, and participation in, learning opportunities 1.6 Ensure effective liaison occurs with training and development specialists and contributes to learning opportunities which enhance individual, team and organisational performance
2. Facilitate and promote learning	2.1 Develop strategies to ensure that workplace learning opportunities are used and that team members are encouraged to share their skills and knowledge to encourage a learning culture within the team 2.2 Implement organisational procedures to ensure workplace learning opportunities contribute to the development of appropriate workplace knowledge, skills and attitudes 2.3 Implement policies and procedures to encourage team members to assess their own competencies and to identify their own learning and development needs 2.4 Share the benefits of learning with others in the team and organisation 2.5 Recognise workplace achievement by timely and appropriate recognition, feedback and rewards
3. Monitor and improve learning effectiveness	3.1 Use strategies to ensure that team and individual learning performance is monitored to determine the type and extent of any additional work-based support required and any Work Health and Safety (WHS) issues 3.2 Use feedback from individuals and teams to identify and introduce improvements in future learning arrangements 3.3 Make adjustments, negotiated with training and development specialists, for improvements to the efficiency and effectiveness of learning 3.4 Use processes to ensure that records and reports of competency are documented and maintained within the organisation’s systems and procedures to inform future planning

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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, 1.2, 1.3, 1.4, 2.1, 2.4, 3.1, 3.2	• Develops strategies to develop learning plans of self and others to meet a diversity of needs within organisational constraints • Transfers skills and knowledge to a variety of learning development contexts
Reading	1.1-1.5, 2.1, 2.2, 2.5, 3.1-3.4	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements
Writing	1.3, 1.4, 2.1, 2.2, 2.3, 2.5, 3.3, 3.4	• Uses information from a range of sources to develop and document plans, strategies and feedback in accordance with organisational requirements • Maintains records using correct technical and organisational vocabulary
Oral Communication	1.6, 2.4, 2.5, 3.2, 3.3	• 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
Navigate the world of work	1.5, 2.2, 2.3, 3.1, 3.4	• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements • Understands how own role meshes with others and contributes to broader goals
Interact with others	1.6, 2.1, 2.3 -2.5, 3.2, 3.3	• 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
Get the work done	1.1, 1.2, 1.3, 1.4, 2.1, 2.5, 3.1, 3.4	• Uses logical processes to plan, implement and monitor learning in the workplace • Systematically gathers and analyses relevant

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		information and evaluates options to make informed decisions • Evaluates outcomes of decisions to identify opportunities for improvement • Uses digital tools to organise, store, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED501 Develop a workplace learning environment	BSBLED501A Develop a workplace learning 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

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Assessment Requirements for BSBLED501 Develop a workplace learning 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:

- collaboratively review performance development needs of individuals and teams
- plan professional development for individuals and teams that enhances organisational performance
- develop and implement learning plans
- liaise with training and development specialists
- recognise workplace achievement by giving feedback, recognition and rewards
- monitor and improve workplace learning
- record and report workplace learning outcomes.

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 how management of relationships can achieve a learning environment
- identify 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

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- structured learning
- work-based learning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- workplace policies and procedures
- workplace equipment and resources
- case studies and, where available, 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

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BSBLED502 Manage programs that promote personal effectiveness

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 programs with a health and wellbeing focus. The unit addresses management 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).

It applies to individuals who take responsibility for managing staff health and wellbeing 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. It is not assumed the individual will be directly involved in delivering the programs.

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

Unit Sector

Workforce Development – Learning and Development

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Research and analyse employee health issues	1.1 Identify and collect information on employee health issues from appropriate internal and external sources 1.2 Review findings and their implications for the organisation and business objectives 1.3 Develop options for addressing identified health issues 1.4 Obtain support from senior managers for preferred option
2. Plan health and wellbeing program	2.1 Develop program scope and objectives in consultation with appropriate industry consultants, colleagues and managers 2.2 Plan and create administrative structure and resources for program 2.3 Establish program responsibilities and clearly communicate to all stakeholders 2.4 Plan communications and marketing strategies in conjunction with stakeholders 2.5 Establish suitable evaluation methods, develop an overall program management plan and communicate this plan to stakeholders
3. Implement, administer and monitor program	3.1 Prepare policy documents, implement and monitor strategies in conjunction with program team members 3.2 Provide appropriate support, assistance and mentors to relevant personnel 3.3 Implement and monitor tracking systems according to program guidelines 3.4 Reach program milestones within agreed timelines and provide regular progress reports to stakeholders
4. Evaluate 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

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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, 2.1-2.5, 3.1, 3.3, 3.4, 4.1-4.3	• Compares and contrasts information and demonstrates an understanding gained from a variety of sources such as marketing and communication plans
Writing	1.1-1.3, 2.1-2.5, 3.1-3.4, 4.1-4.3	• Integrates information from a number of sources and develops content using clear language that supports the purpose and context
Oral Communication	1.1, 1.4, 2.1, 2.3-2.5, 3.1, 3.2, 3.4, 4.1, 4.2	• Applies appropriate strategies to communicate main ideas in a range of contexts, and listening and questioning techniques to confirm understanding
Navigate the world of work	1.2, 2.2, 3.1, 4.3	• Recognises, responds and contributes to organisational procedures and protocols • Understands how own role meshes with others and contributes to broader goals
Interact with others	1.4, 2.1, 2.4, 3.1, 3.2	• 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
Get the work done	1.1, 1.3, 2.1-2.5, 3.1, 3.2, 3.3, 3.4, 4.1	• 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

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED502	BSBLED502A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
Manage programs that promote personal effectiveness	Manage programs that promote personal effectiveness	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

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Assessment Requirements for BSBLED502 Manage programs that promote personal effectiveness

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:

- collaboratively plan and implement a health and wellbeing program
- develop an overall program management plan
- provide feedback to stakeholders on:
  - program responsibilities
  - program milestones
  - evaluation outcomes
- prepare policy documents
- provide appropriate support to relevant personal
- monitor and review program
- incorporate outcomes into organisational 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:

- identify a range of employee health issues and options for improving health outcomes
- locate and name relevant industry consultants
- outline steps to create a program management plan
- explain why it is important to monitor program progress.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- relevant workplace documentation, equipment and resources
- case studies and, where available, 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

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BSBLED503 Maintain and enhance professional practice

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 individuals to manage their own professional development and ongoing performance.

This unit addresses the process required to maintain a high level of professional performance in a particular field. It includes modelling high standards of performance according to professional standards and procedures, and the processes and outcomes involved in determining professional development needs and participating in associated activities.

It applies to individuals who are required to maintain and manage their professional development at a high standard. 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

Workforce Development – Learning and Development

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. Model high standards of performance	1.1 Ensure personal performance is consistent with the organisation's goals and objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Ensure work goals and plans reflect individual responsibilities in accordance with organisational and legal requirements
2. Determine personal development needs	2.1 Assess personal skills and knowledge against relevant benchmarks to determine development needs and priorities 2.2 Identify changes in professional practices and codes of conduct 2.3 Use feedback from colleagues and clients to identify personal learning needs and areas of professional development 2.4 Identify future career options 2.5 Update and document personal learning needs 2.6 Discuss personal development needs with relevant personnel for inclusion in professional development plan
3. Participate in professional development activities	3.1 Select development opportunities suitable to personal learning styles to support continuous learning and maintain currency of professional practice 3.2 Participate in professional networks to support continuous learning and to maintain professional practice 3.3 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 professional practice and integrate into work performance 4.2 Use feedback from colleagues, supervisors, staff and clients to identify and introduce improvements in work performance 4.3 Identify innovative and responsive approaches for improving professional practice using continuous improvement techniques and processes 4.4 Track progress through a personal portfolio or other mechanism 4.5 Manage records, reports and recommendations 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	Description

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	Criteria	
Learning	2.1, 2.3, 2.5, 2.6, 3.1, 3.2, 4.1, 4.2	• Identifies and implements strategies to build on knowledge and skills
Reading	1.2, 2.1-2.5, 3.1-3.3, 4.1-4.5	• Interprets textual information obtained from a range of sources and determines how content may be applied to individual and organisational requirements
Writing	1.1, 1.2, 2.1-2.5, 3.1-3.3, 4.1-4.5	• Researches and integrates information from a number of sources and develops content that supports the purposes and format of the material, using clear and logical language and structures
Oral Communication	2.3, 2.6, 3.2, 4.2	• Uses listening and questioning skills to gather information • Derives meaning from language used in a range of oral contexts
Navigate the world of work	1.1, 1.2, 2.2, 2.4	• Recognises, responds and adheres to organisational procedures and protocols and legislative requirements • Understands how own role meshes with others and contributes to broader goals • Reviews current situation and future career and work options
Interact with others	2.3, 2.6, 3.2, 4.2	• Uses collaborative processes to gather required feedback • Recognises the importance of networking to establish effective working relationships
Get the work done	1.2, 3.1, 3.3, 4.2, 4.3, 4.4, 4.5	• Plans, implements and managers relatively complex, tasks with an awareness of how they may contribute to longer-term operational and strategic goals • Analyses information, including feedback from others, to make decisions about how performance could be improved • Actively looks for innovative ways to introduce improvements • Uses digital technologies to communicate information and ideas to an expanding range of audiences

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED503 Maintain	BSBLED503A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
and enhance professional practice	Maintain and enhance professional practice	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

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Assessment Requirements for BSBLED503 Maintain and enhance professional practice

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:

- adhere to organisation's framework when setting personal goals and plans
- determine personal learning needs incorporating feedback obtained from colleagues and clients
- document personal learning needs in a professional development plan
- use networking and professional development activities to maintain own professional practice
- identify and implement improvements to own professional practice and keep records of progress.

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 organisational goals and objectives and how they impact personal work goals and objectives
- list a range of continuous improvement techniques and processes, and their application
- identify networks relevant to professional practice
- describe the types and availability of professional development activities and opportunities
- outline relevant legislation, codes of practice and standards that apply to professional practice.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- relevant legislation, regulations and codes of practice
- workplace documentation detailing organisational goals, objectives, policies and procedures
- business technology
- case studies and, where available, real situations
- interaction with others
- contemporary information on professional development and career planning relevant to occupation.

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

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BSBLED802 Lead learning strategy implementation

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 professional leadership in improving organisational learning, and the quality of training and assessment products and services.

It also covers leading strategy formation; designing, developing and implementing an organisational learning strategy; and reviewing and improving overall organisational learning and development.

It 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

Workforce Development – Learning and Development

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. Provide leadership to learning strategy formation	1.1 Evaluate approaches to learning and workplace training against organisational strategic requirements 1.2 Analyse the contribution of organisational learning to

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ELEMENT	PERFORMANCE CRITERIA
	competitiveness, and confirm with key 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 requirements 1.5 Analyse and plan technological and systems requirements for an organisational learning strategy 1.6 Analyse and align organisational learning strategy with human resources and learning requirements and plans
2. Design and develop organisational learning strategy	2.1 Design organisational learning strategy to achieve instructor, learner and organisational strategic requirements 2.2 Include relevant units of competency, modules from accredited courses or non-accredited training specifications in organisational learning strategy 2.3 Develop flexible organisational learning strategies to permit and promote responsiveness of the organisation to changed circumstances and priorities 2.4 Design and develop learning and assessment strategies to support organisational strategic requirements 2.5 Establish processes and procedures for allocating and managing resources and staff, required to implement organisational learning strategy 2.6 Structure compliant assessment and recognition policies and processes appropriate to organisational strategic requirements 2.7 Structure procurement and supply policies and processes appropriate to organisational strategic requirements
3. Implement organisational learning strategy	3.1 Implement organisational learning strategy appropriate to organisational requirements 3.2 Validate organisational assessment methods and assessment tools consistent with learning and wider operational needs 3.3 Source learning resources compliant with specific international, national, industry and workplace needs 3.4 Review policies and procedures for continuing relevance, operational effectiveness and to identify any gaps 3.5 Systematically evaluate strategic outcomes attained through organisational learning strategy and update policies and procedures accordingly

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ELEMENT	PERFORMANCE CRITERIA
4. Review organisational learning and development	4.1 Develop procedures to systematically liaise with educators, learners and others to monitor how well learning strategies and learning resources achieve organisational learning targets 4.2 Monitor and incorporate national policy and system changes into organisational learning and development strategies and practices 4.3 Modify or design learning strategies and learning resources to support implementation of improved learning policies and procedures
5. Improve organisational learning strategy formation	5.1 Evaluate end-to-end implementation of organisational learning strategy 5.2 Review performance of resources and people supporting organisational learning strategy implementation 5.3 Construct and present plans for improving organisational learning strategy formation

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	1.1-1.6, 2.1-2.7, 3.2-3.5, 4.1-4.3, 5.1-5.3	• Interprets, analyses and evaluates a range of textual information to assist in determining and developing strategies and to manage organisational requirements
Writing	1.1-1.6, 2.1-2.7, 3.2, 3.5, 4.1-4.3, 5.1-5.3	• 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	1.2, 5.3	• Uses vocabulary and features appropriate to audience when presenting information and ideas • Uses listening and questioning techniques to seek opinions and confirm understanding
Navigate the world of work	1.1, 1.4, 2.1, 2.4, 2.6, 2.7, 3.1, 3.4, 3.5, 4.1, 4.2	• Takes a lead role in the development and review of organisational policies and procedures to meet compliance obligations and organisational strategic requirements

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		• Keeps up-to-date with changes to relevant legal requirements and considers implications of these when negotiating, planning and undertaking work
Interact with others	1.2, 5.3	• Selects and uses appropriate communication practices to present ideas and encourage participation from all levels of personnel
Get the work done	1.3-1.6, 2.1, 2.3-2.7, 3.5, 4.1, 4.3, 5.1, 5.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED802 Lead learning strategy implementation	BSBLED702A Lead learning strategy implementation	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED802 Lead learning strategy implementation

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:

- research and evaluate models and approaches to organisational learning to support strategic requirements
- examine and review organisational policies and procedures relevant to training and assessment
- develop consultation and communication processes to support and encourage personnel input into design, implementation and review of organisational learning strategy including:
  - planning technological and systems requirements
  - creating in-built flexibility for change in organisational priorities
  - implementing appropriate processes
- initiate and implement learning program partnerships in line with relevant regulatory, employment and organisational requirements
- source learning resources or assessment tools, and modify if required, to meet requirements of organisational learning strategies
- implement plans for improving organisational learning 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 authoritative responsibilities and parameters within the organisation
- describe consultation and communication processes to support and encourage organisational input into policy and procedure development processes
- list contemporary approaches to assessment instrument and strategy design
- describe contemporary organisational learning strategy design and development

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- outline continuous improvement processes associated with organisational learning strategy
- explain implementation processes and their impact on an organisation
- identify locations, types and sources of relevant organisational documentation
- list organisational evaluation strategies
- identify organisational learning theory
- describe quality management compliance requirements as it relates to organisational learning
- outline a range of international e-learning compliance regimes
- list relevant authority compliance requirements and obligations, for example under the Australian Quality Training Framework (AQTF) and Standards for Registered Training Organisations (where applicable)
- identify legislation, codes of practice and national standards relevant to job role
- outline technology and systems requirements to support an organisational learning strategy.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- organisational policies and procedures
- office equipment and resources
- business technology
- case studies and, where available, real situations
- interaction with others
- information on current training and assessment 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBLED803 Implement improved learning practice

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 initiate and implement advanced learning practice that supports improvement of learning strategies in an organisational context.

The unit also covers evaluating ways to improve learning practice, managing and monitoring means to improve learning, and analysing and advancing adoption of improved learning practice.

It applies to leaders or individuals who use learning to build organisational capabilities. It focuses on using research, theoretical analysis and professional investigation to identify ways of improving learning practice and implementing appropriate pedagogy.

Methods for improving learning practice include developing individual staff members from the perspective of the organisation's needs and imperatives, and enhancing outcomes for learners and candidates.

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

Unit Sector

Workforce Development – Learning and Development

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1. Evaluate ways to improve learning practice	1.1 Review advances in learning practice within a given 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 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 qualification requirements for nominated qualification/s
2. Manage and monitor means to improve learning	2.1 Observe and assess learner styles with respect to appropriateness of current vocational, training and educational learning strategies 2.2 Evaluate 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 experience and personal interests of learner
3. Analyse and advance adoption of improved learning practice	3.1 Develop improved vocational, training and educational learning practice appropriate to learner characteristics 3.2 Advocate for improved vocational, training and educational 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	Description

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	Criteria	
Learning	3.4, 3.5	• Reviews existing learning practices and actively designs and manages processes to improve and promote own training and learning knowledge and skills
Reading	1.1-1.4, 2.1-2.4, 3.1, 3.3, 3.4	• Interprets textual information obtained from a range of sources and determines how content may be applied to develop and implement improved learning practices
Writing	1.1-1.5, 2.1-2.4, 3.1, 3.3, 3.4	• Integrates information and ideas from a range of sources, utilising appropriate support materials to manage and develop improved learning practices
Oral Communication	1.2, 1.3, 3.2, 3.4, 3.5	• Presents information and encourages discussions using language and features appropriate to audient • Uses listening and questioning techniques when testing or discussing improved learning practices
Interact with others	1.2, 1.3, 3.2, 3.4, 3.5	• Tailors communication to achieve its purpose, demonstrating understanding of the needs, interests, issues and priorities of each audience
Get the work done	1.1, 1.3, 2.1-2.4, 3.1, 3.3, 3.4	• Uses logical planning processes and an increasingly intuitive understanding of context to plan, implement and monitor learning practices and strategies • Systematically gathers and analyses relevant information and evaluates options to make informed decisions • Considers strategic and operational potential of digital trends to achieve work goals and enhance work processes • Evaluates outcomes of decisions to identify opportunities for improvement • Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency • Evaluates learning strategy implementation, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable in future

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED803 Implement improved learning practice	BSBLED703A Implement improved learning practice	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED803 Implement improved learning practice

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:

- evaluate and test approaches to learning practices including:
  - reviewing advances in learning practices
  - determining contextual needs of relevant individuals
  - ensuring qualification requirements are met
- integrate current learning pedagogies including:
  - learning styles
  - learning strategies
- develop and research improved learning practices including:
  - awareness of learner characteristics
  - trialling new practices
  - implementing a mentoring strategy.

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 contemporary policy and approaches to vocational learning and assessment
- outline relevant concepts relating to pedagogical theory and practice, learner interests and changing learning styles
- list different learning styles and explain how different training approaches may suit different learning styles
- outline adult learning principles
- outline how instructional design principles can improve learning practice
- list a range of appropriate learning strategies, and teaching and assessment methods

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- explain how information and communication technology can be used in learning and teaching
- explain training techniques that can be used to enhance learning and when to use them
- explain the similarities and differences between mentoring and coaching
- outline requirements for relevant delivery and assessment strategies
- identify sources and availability of relevant learning resources and learning materials.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- information on current trends in learning and assessment requirements and practices
- office equipment and resources
- case studies and, where available, 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

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BSBLED804 Review enterprise e-learning systems and solutions implementation

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 design, review and implement advanced enterprise electronic learning (e-learning) solutions.

It applies to individuals working in senior management teams. These individuals manage the introduction of information and communication technology (ICT) systems and processes to enhance individual, team and organisational capabilities.

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

Unit Sector

Workforce Development – Learning and Development

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. Evaluate trends in e-learning	1.1 Identify and differentiate forms of e-learning 1.2 Analyse trends in deployment of ICT in education and learning 1.3 Analyse and evaluate integration of ICT for learning and business purposes 1.4 Explore how convergence of different technologies can affect learning practice

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ELEMENT	PERFORMANCE CRITERIA
2. Monitor e-learning resource alignment to organisational requirements	2.1 Research trends in teaching methods associated with different types of electronic learning resources 2.2 Determine organisation's strategic and learning requirements 2.3 Analyse and report risks associated with e-learning implementation 2.4 Devise policy and procedures to ensure brief, focus and type of e-learning resources are designed to organisational requirements 2.5 Establish how international e-learning regimes, human resources and learning policies and procedures will affect design of e-learning resources
3. Test and evaluate e-learning solutions	3.1 Ensure parameters for testing e-learning solutions are consistent with technical, user and organisational requirements 3.2 Review e-learning resources and e-learning systems or solutions against criteria tied to learner and organisational requirements 3.3 Adjust learning resource design or delivery methods where required to meet changing user and organisational requirements 3.4 Test and evaluate instructional design principles as appropriate for given focus and context 3.5 Consult with learners, educators, designers and other personnel to evaluate constraints relating to organisation's e-learning systems and resources 3.6 Use research findings and reports on suggested improvements to e-learning resources or systems design to inform future 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	1.1-1.4, 2.1-2.5, 3.1-3.6	• Interprets and critically analyses structurally complex texts and draws on a repertoire of strategies to maintain understanding of solutions for e-learning systems

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Writing	1.1-1.4, 2.1-2.5, 3.1-3.6	• Integrates information and ideas from a range of sources, utilising appropriate support materials to evaluate, monitor and test e-learning solutions
Oral Communication	3.5	• Present ideas to a range of audiences to test and evaluate e-learning solutions
Navigate the world of work	2.4, 2.5, 3.1-3.3	• Contributes to development of organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	3.5	• Collaborates with others to achieve required outcomes, tailoring communication to suit the audience
Get the work done	1.1-1.4, 2.2, 2.3, 2.5, 3.1-3.6	• Uses logical planning processes and an increasingly intuitive understanding of context to plan, implement and monitor learning in workplace • Systematically gathers and analyses relevant information and evaluates options to make informed decisions • Evaluates outcomes of decisions to identify opportunities for improvement • Uses digital tools to organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED804 Review enterprise e-learning systems and solutions implementation	BSBLED704A Review enterprise e-learning systems and solutions implementation	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED804 Review enterprise e-learning systems and solutions implementation

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:

- improve organisational capabilities by implementing advanced e-learning solutions
- identify and research trends in e-learning
- determine organisation’s learning requirements and create policy and procedures to support design or selection of e-learning resources to meet the organisation's requirements
- identify and report risks associated with e-learning implementation
- test, review and adjust e-learning resources and systems as required
- collaboratively research e-learning opportunities, constraints and 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:

- explain how to create an effective learning experience using electronic technology
- describe a range of e-learning environments and their application in designing e-learning resources
- describe instructional design principles for electronic materials
- explain the considerations in devising an e-learning and assessment strategy
- describe methods for system testing and evaluation
- explain how international e-learning regimes and organisational policies and procedures impact on e-learning in the workplace
- list relevant policy, legislation, codes of practice and national standards, including AQTF Standards for Registered Training Organisations (if applicable).
-

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- information on current trends in e-learning and instructional design principles
- office equipment and resources
- case studies and, where available, 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

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BSBLED805 Plan and implement a mentoring program

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 a mentoring program for a particular section or group within an educational organisation, or for a specific business purpose or objective within an enterprise whose core business is not education, or as a collaborative partnership spanning more than one organisation (such as to advance occupational or industry-specific skill needs).

It applies to individuals who plan, develop, implement, monitor and evaluate a mentoring program that results in learning forged through a defined and active learning partnership with a mentor. The program should develop and use tools that enhance both the learning and the phased relationship, and it should be monitored and evaluated to ensure it explores and meets the mentee's learning needs.

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

Unit Sector

Workforce Development – Learning and Development

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. Plan mentoring program	1.1 Determine benefits of, and need for, a mentoring program 1.2 Define mentoring program purpose and objectives 1.3 Develop mentoring program plan with appropriate outcomes,

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ELEMENT	PERFORMANCE CRITERIA
	in consultation with key stakeholders 1.4 Establish relevant management structures and wider support requirements 1.5 Determine mentoring program modes and methods 1.6 Determine methods and resources required to report mentoring program outcomes
2. Develop tools and materials to support mentoring program	2.1 Develop range of tools and resources appropriate to mentoring program modes and methods 2.2 Establish mentor and mentee selection criteria, procedures and tools 2.3 Establish formal requirements for mentor-mentee relationship and communicate these requirements to all parties 2.4 Establish rules, procedures and requirements encompassing key accountabilities and responsibilities 2.5 Develop means to report and collate outcomes from mentor–mentee relationship
3. Coordinate mentor and mentee relationships	3.1 Implement strategies for recruiting and accurately matching mentors with mentees 3.2 Induct mentors and mentees into program 3.3 Ensure plans required for personal growth are developed by mentors and mentees 3.4 Cultivate rapport, mutual trust and teamwork in mentoring relationship 3.5 Consider and address cultural differences and diversity issues in all mentor-mentee communications 3.6 Use data and reporting tools supporting program to monitor mentor-mentee relationship
4. Evaluate mentoring program	4.1 Complete mentoring record-keeping and reporting requirements using agreed technology, reporting processes and procedures 4.2 Evaluate mentoring program against agreed outcomes and report through relevant management structures 4.3 Document improvement opportunities for future mentoring programs based on program evaluation

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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	1.1-1.6, 2.1-2.5, 3.1-3.3, 3.6, 4.1-4.3	• Interprets textual information obtained from a range of sources and determines how content may be used to meet requirements
Writing	1.1-1.6, 2.1-2.5, 3.1, 3.2, 4.1-4.3	• Communicates complex relationships between ideas and information by creating reports • Documents results of mentoring program using required organisational formats
Oral Communication	1.3, 2.3, 2.5, 3.1, 3.2, 3.4, 3.5, 4.2	• Uses appropriate language to provide information and encourage discussions • Applies listening and questioning techniques to check and confirm understanding
Navigate the world of work	4.1	• Adheres to organisational policies and procedures
Interact with others	1.3, 2.3, 3.2, 3.4, 3.5, 4.2	• Tailors communication to achieve its purpose, demonstrating understanding of needs of particular audiences • Collaborates with others to set and facilitate shared outcomes • Invests time and energy in building rapport with others as an integral part of interactions
Get the work done	1.1-1.6, 2.1, 2.2, 2.4, 2.5, 3.1, 3.6, 4.3	• Plans, organises and implements tasks required for mentoring program, including coordinating schedules for interviews and sessions with others • Identifies and analyses issues to aid in decisions about appropriate modes, methods and resources • Evaluates outcomes of decisions, considering results from a range of perspectives and identifying key concepts and principles that may be adaptable to future situations • Uses digital tools to store, access and organise information about the mentoring program

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED805 Plan and implement a mentoring program	BSBLED705A Plan and implement a mentoring program	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED805 Plan and implement a mentoring program

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 a mentoring program plan in consultation with others including:
  - establishing a management structure
  - determining support structures
  - establishing methods and resources to achieve designated outcomes
  - mentor and mentee selection process
- develop appropriate tools and resources for a mentoring program
- establish mentor-mentee policies and procedures
- coordinate mentor-mentee communications
- evaluate and document results of mentoring program.

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 purposes and benefits of a mentoring program
- outline the components of a mentoring program plan
- explain mentoring program design principles
- explain the roles of a mentor and a mentee
- explain criteria that could be used to screen and match mentors and mentees
- identify legislation and organisational policies relevant to mentoring, including confidentiality and privacy requirements
- explain how resource requirements vary according to the mentoring program mode
- describe how mentoring program data is collected and where data is stored
- outline methods for evaluating and reporting on mentoring programs.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- office equipment and resources
- relevant legislation and workplace documents
- case studies and, where available, 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

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BSBLED806 Plan and implement a coaching strategy

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 develop a coaching strategy and to monitor implementation of the coaching program within an organisational context. A coaching strategy may be:

- an internal program forming part of the professional development activities of an educational organisation (such as a Registered Training Organisation) or an enterprise whose core business is not education
- developed for an external client, for example as part of the range of learning services offered or conducted in a collaborative partnership with more than one organisation.

It applies to individuals working to ensure learning advances individual and organisational capabilities. Leaders in learning are typically required to develop and implement coaching strategies in a systematic manner, and to monitor, review and improve strategies to optimise learning outcomes for individuals and the organisation.

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

Unit Sector

Workforce Development – Learning and Development

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. Develop coaching	1.1 Research and review need for and role of, coaching within an

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ELEMENT	PERFORMANCE CRITERIA
strategy	organisation 1.2 Establish a framework for coaching strategy based on organisational context and needs 1.3 Determine roles, responsibilities and outcomes for key individuals involved in coaching strategy 1.4 Develop timelines for coaching strategy implementation in consultation with stakeholders 1.5 Obtain organisational support for coaching strategy in accordance with organisational procedures
2. Prepare for coaching strategy implementation	2.1 Plan coaching program and coaching models to suit coaching strategy and the organisation's worker and employer issues 2.2 Design induction and training requirements 2.3 Design tools and resources for coaches and trainees 2.4 Analyse legal, regulatory and organisational compliance requirements for coaches 2.5 Establish recruitment processes for coaches and trainees
3. Implement coaching strategy	3.1 Promote coaching program 3.2 Recruit and select coaches and trainees 3.3 Establish tools, mechanisms and procedures for matching and managing coach-trainee relationship 3.4 Induct, match and brief coaches and trainees
4. Monitor and support coaching strategy	4.1 Ensure coaching strategy is implemented consistently with work practices and operational requirements 4.2 Provide coaches with access to professional development and support necessary to acquit their role effectively and efficiently 4.3 Design techniques and practices for resolving differences and problems in coaching relationships 4.4 Monitor coaching relationships to ensure accordance with organisational policies and procedures 4.5 Recognise and acknowledge positive contribution individuals make to coaching activities
5. Review and report on coaching strategy	5.1 Collect, analyse and report data on coaching outcomes at individual or group level, in line with organisational context and needs 5.2 Identify and promote ongoing opportunities for coaching in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with individual and organisational context and needs 5.3 Evaluate coaching strategy, document findings and present recommendations for improvement to relevant others

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	1.1-1.5, 2.1-2.5, 3.3, 3.4, 4.1, 4.3, 4.4	• Analyses and evaluates information from various sources to plan, implement and review a coaching strategy
Writing	1.2-1.4, 2.1-2.3, 2.5, 3.3, 4.1, 4.3, 5.3	• Records results of research and analysis of information and consultations using clear and comprehensible language and layout • Documents plans, processes and procedures to support the organisational coaching strategy • Reports on outcomes of mentoring program using language and layout appropriate to audience and context
Oral Communication	1.4, 1.5, 3.1, 3.2, 3.4, 4.5, 5.2	• Uses appropriate language to provide information and encourage discussion • Applies listening and questioning techniques to check and confirm understanding
Numeracy	1.4	• Uses basic mathematical calculations and arranges sequential numerical information to develop coaching timelines
Navigate the world of work	1.5, 2.4, 4.1, 4.4, 5.1, 5.2	• Adheres to organisational policies, procedures and standards and considers own role in terms of its contribution to broader goals of work environment • Adheres to legislation and regulations relevant to own role
Interact with others	1.4, 1.5, 3.1, 3.4, 4.3, 4.5, 5.1, 5.2, 5.3	• Tailors communication to achieve its purpose, demonstrating understanding of the needs of particular audiences • Collaborates with others to set and facilitate shared outcomes • Invests time and energy in building rapport with others

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		as an integral part of all work-based interactions
Get the work done	1.1-1.5, 2.1, 2.5, 3.2, 3.3, 4.2, 4.3, 5.1-5.3	• Plans, organises and implements tasks required to plan, implement and monitor coaching in workplace • Systematically gathers and analyses relevant information and evaluates options to make informed decisions • Evaluates outcomes of decisions to identify opportunities for improvement • Uses analytical processes to anticipate or address problems, generating possible solutions depending on differing operational contingencies and environments • Uses digital tools to store, access and organise information about the coaching program

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED806 Plan and implement a coaching strategy	BSBLED706A Plan and implement a coaching strategy	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED806 Plan and implement a coaching strategy

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 a coaching strategy according to organisational needs including:
  - developing a timeline for implementation of strategy
  - seeking support from appropriate others
- plan and design a coaching program including:
  - designing tools and resources
  - analysing compliance requirements
  - establishing recruitment processes
- implement coaching strategy according to operational requirements
- ensure coaches are supported according to relevant policies and procedures
- monitor, review and report on implementation, utilising coaching data to recommend improvements to the coaching strategy.

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 coaching techniques
- list and describe the components of a coaching strategy
- explain coaching program design principles
- explain how resource requirements vary according to the coaching program model used
- explain the methods used to match and manage coaches and trainees
- outline techniques and practices for resolving differences between coaches and trainees

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- identify legislation, regulations, policies, procedures and guidelines relating to workplace coaching, including confidentiality and privacy requirements
- describe how coaching program data is collected and where data is stored
- outline methods for evaluating and reporting on coaching programs.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- workplace policies and procedures
- office equipment and resources
- case studies and, where available, 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

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BSBLED807 Establish career development 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 plan, implement and evaluate career development services in accordance with professional standards to facilitate well-considered career decision-making by participants.

It applies to individuals seeking to provide career development services in accordance with professional standards.

A wide range of career development programs and services may be provided in many different jurisdictions and delivery settings. Their object is to assist individuals gain the knowledge, skills, attitudes and behaviours required to manage their life, learning and work in self-directed ways.

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

Unit Sector

Workforce Development – Learning and Development

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. Apply career development standards	1.1 Research contemporary career development theories, models, frameworks and strategies for specific context and target group 1.2 Analyse codes of professional conduct and career development

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ELEMENT	PERFORMANCE CRITERIA
	standards, and how they can be applied in work practice 1.3 Apply regulatory requirements, policies, guidelines, standards and resources 1.4 Plan for and undertake ongoing personal professional development 1.5 Apply career development standards to all aspects of work role 1.6 Establish and maintain relationships with professional peers and service providers
2. Plan for career development services	2.1 Apply career development theories in preparation to work with specific target groups 2.2 Analyse career development needs of specific target groups 2.3 Plan for support systems and resources required to provide high-quality career development service delivery in specific context and for target group 2.4 Apply effective action-planning skills in career development counselling services 2.5 Establish ongoing professional and follow-up support for clients of career development services
3. Implement career development services strategies	3.1 Develop strategies for career development services to reflect contextual needs and aspirations of specific target group 3.2 Encourage individuals to commit to, and access, career development services 3.3 Establish mechanisms to follow-up provision of career development services 3.4 Implement strategies to ensure records storage, security and privacy in accordance with professional and organisational requirements 3.5 Establish referral procedures and contacts
4. Review career development services delivery strategies and plans	4.1 Review career development services and service delivery strategies against plans and standards, and identify any gaps 4.2 Advocate for target group and individual career development needs and choices 4.3 Determine strategies to improve quality of career development services 4.4 Discuss alternative career development strategies with key stakeholders

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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	1.4	• Identifies and implements strategies to update own skills and knowledge
Reading	1.1-1.5, 2.1-2.5, 3.1-3.5, 4.1. 4.3	• Identifies, analyses and evaluates information from various complex texts to assess career development standards and establish career development services
Writing	1.1, 1.4, 2.1-2.5, 3.1, 3.3-3.5, 4.1-4.3	• Records results of research and analysis using clear and comprehensible language and layout • Uses various strategies to plan, draft, review and proofread own writing relating to career development services
Oral Communication	1.6, 3.2, 4.2, 4.4	• Presents information and discusses ideas using vocabulary and features appropriate to the target groups • Uses listening and questioning skills to confirm and clarify understanding
Navigate the world of work	1.2, 1.3, 1.5, 3.4	• Adheres to organisational policies, procedures and standards and considers own role in terms of its contribution to broader goals of work environment • Keeps up-to-date with legislative requirements and considers implications of these when negotiating, planning and undertaking work
Interact with others	1.6, 3.2, 4.2, 4.4	• Tailors communication to achieve its purpose, demonstrating understanding of the needs of the particular audience • Invests time and energy in building rapport and positive working relationships with others as an integral part of work-based interactions
Get the work done	1.2, 1.4, 2.1-2.5, 3.1, 3.3-3.5, 4.1, 4.3	• Plans, organises and implements tasks required to provide career development services and supports according to required standards • Systematically gathers and analyses relevant information and evaluates options to make informed decisions about career development strategies • Evaluates outcomes of decisions to identify opportunities for improvement

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED807 Establish career development services	BSBLED707A Establish career development services	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED807 Establish career development 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:

- collect, evaluate and use information to inform career development strategies, support systems and resources
- analyse, plan, implement and evaluate career development services, in accordance with legislative requirements, policies, guidelines and standards
- identify own professional development needs and complete required professional development activities
- determine the needs of specific target groups
- communicate with others to provide professional support and advocacy services
- review and improve career development services, in consultation with other people.

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 current career development theories
- explain what career development standards are and their impact on career development services
- outline legislative and regulatory requirements relevant to career development
- outline organisational policies relating to career development
- explain why researching and understanding the target group is crucial in providing support on career development and career choices.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- office equipment and resources
- organisational policies and procedures
- legislative and regulatory requirements
- case studies and, where available, 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

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BSBLED808 Conduct a career development session

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 career development sessions that promote well-considered career choices. It also covers applying appropriate career development theory; assisting individuals to make informed career choices; communicating professionally to promote career development outcomes; and using resources and technology to support career development sessions.

It applies to individuals seeking to conduct career development sessions in accordance with professional standards.

Careers are unique to each person and vary with specific target audiences. Career development sessions may be provided in a variety of ways given different organisational contexts, individuals involved and delivery settings. The professional expertise of the provider and their use of effective interpersonal and communication skills are central to the success of a career development session.

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

Unit Sector

Workforce Development – Learning and Development

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Apply appropriate career development theory	1.1 Research major career development theories and models 1.2 Analyse differences between advice, information provision and professional standards in relation to career development 1.3 Apply theory in an appropriate manner, both to individuals involved and in context for a career development session 1.4 Evaluate models appropriate for individual and group career development sessions 1.5 Analyse diversity of individuals and target group, when planning a career development session
2. Conduct career development sessions	2.1 Conduct career development counselling in a clear and unambiguous manner 2.2 Complete problem and goal clarification to satisfaction of all involved 2.3 Utilise key skills to successfully complete career development sessions 2.4 Identify common patterns of thinking, feeling and behaviour limiting making or acting on well-considered choices, and devise counter strategies 2.5 Effectively apply rapport building and attending skills 2.6 Ensure participants set personal goals and make informed choices in career development session 2.7 Consistently apply effective responding skills when giving feedback on progress during career counselling session
3. Assist individuals make informed career choices	3.1 Assist individuals to identify career development needs 3.2 Determine individual needs and aspirations holistically, in context of individuals' lives 3.3 Identify individual career development needs that fall outside scope of practice of career development service provider 3.4 Refer individuals to or inform them of, appropriate sources of further information or career development support services where required
4. Communicate professionally to promote career development outcomes	4.1 Communicate accurate assessment of individual needs 4.2 Create cooperative and productive environment for conduct of career development session 4.3 Create a climate of trust, comfort and safety for conduct of career development sessions

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ELEMENT	PERFORMANCE CRITERIA
	4.4 Complete career development work in an ethical, cooperative and respectful manner within team and wider organisational context
5. Use resources and technology to support career development sessions	5.1 Acquire, record and prepare relevant information prior to a career development session 5.2 Prepare accurate records and reports in accordance with professional conduct and career development standards 5.3 Assist individuals to use relevant support resources and technology 5.4 Monitor support resources and technology to ensure they support quality outcomes for career development services

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	1.1-1.5, 5.1, 5.2, 5.4	• Analyses, identifies and interprets information in a range of text types relevant to career development
Writing	1.1-1.5, 5.1, 5.2, 5.4	• Records results of research and analysis using clear language and layout • Creates accurate records and reports according to required standards and formats
Oral Communication	1.3, 2.1-2.7, 3.1, 3.4, 4.1-4.4, 5.3	• Interacts effectively in verbal exchanges, using active listening and questioning to convey and clarify information • Clearly explains detailed information using language, tone and pace appropriate to audience
Navigate the world of work	4.4, 5.2	• Understands and adheres to professional and ethical standards of behaviour
Interact with others	1.3, 2.1-2.7, 3.1-3.4, 4.1-4.4, 5.3	• Tailors communication to achieve its purpose, demonstrating a sophisticated understanding of needs, interests, issues and priorities of each individual • Uses a variety of presentation techniques to present information during career development sessions • Invests time and energy in building rapport with others

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		as an integral part of all work-based interactions
Get the work done	1.1, 1.2, 1.4, 1.5, 3.1-3.4, 5.1, 5.2, 5.3, 5.4	• Plans, organises, implements and monitors tasks required to prepare, conduct and report on career development sessions • Systematically gathers and analyses relevant information to make informed decisions about how to tailor sessions to meet individual needs • Uses, and assists others to use, digital tools and technologies to support career development sessions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED808 Conduct a career development session	BSBLED708A Conduct a career development session	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED808 Conduct a career development session

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:

- analyse, plan, implement and evaluate individual and target group career development needs, with an awareness of diversity and ethical requirements
- plan career development sessions according to career development theories and models and career development needs
- use effective communication skills to conduct career development sessions, and provide career counselling and information
- collect, assess and store information for use in a career development services setting.

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 major career development theories and models
- describe common patterns of thinking, feeling and behaviour and their impact on individual career choices
- explain the key skills required to deliver career development sessions
- explain some ways to build rapport with individuals and groups
- outline concepts and principles relating to service provision, including lifelong learning, holistic career development, career decision-making, career coaching, career maintenance, work satisfaction, employability, enterprising, positive uncertainty and planned happenstance
- explain what career development standards are and their impact on career counselling
- outline legislative and regulatory requirements relevant to career counselling
- outline organisational policies relating to career counselling.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- office equipment and resources
- relevant career development documentation and resources
- case studies and, where available, 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

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BSBLED809 Identify and communicate trends in career development

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 research to identify and communicate career trends. It establishes the need to interact professionally with others in assessing career needs, to effectively assist clients identify competencies they require for a career and employability in a given context. It also examines how to maintain quality of career development services and professional practice.

It applies to individuals seeking to identify and communicate trends in career development.

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

Unit Sector

Workforce Development – Learning and Development

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. Research and confirm career trends	1.1 Apply knowledge of changing organisational structures, lifespan of careers and methods of conducting work search, recruitment and selection processes 1.2 Analyse changing worker and employer issues, rights and responsibilities in context of changing work practices 1.3 Examine importance of quality careers development services

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Maintain all research, documentation, sources and references (electronic or physical) to a high degree of currency and relevance 1.5 Analyse implications of relevant policy, legislation, professional codes of practice and national standards relating to worker and employer issues 1.6 Research changes and trends in theory of career development counselling and practice 1.7 Confirm clusters, levels and combinations of transferable employability skills and preferences that may open employment options spanning more than one occupation or career pathway
2. Assess and confirm ongoing career development needs of target group	2.1 Analyse history and records in assessing needs of target group 2.2 Assess success of previous career development services and techniques used for individual or target group 2.3 Deploy other means to investigate appropriate care and counselling approaches as required 2.4 Maintain privacy and security of all data, research and personal records according to relevant policy, legislation, professional codes of practice and national standards 2.5 Establish existing work-life balance requirements, issues and needs
3. Maintain quality of career development services and professional practice	3.1 Analyse and review relevance of career theories, models, frameworks and research for target group 3.2 Incorporate into career development services and professional practice, major changes and trends influencing workplace and career-related options and choices 3.3 Comply with all relevant policy, legislation, professional codes of practice and national standards that influence delivery of career development services

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

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Reading	1.2-1.7, 2.1-2.4, 3.1-3.3	• Interprets structurally complex career development information from multiple sources to identify trends, needs and compliance requirements
Writing	1.2-1.7, 2.1-2.4, 3.1, 3.2	• Records results of research and analysis using clear language and layout • Creates accurate documents according to required standards and formats
Navigate the world of work	1.2, 1.5, 2.4, 3.3	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment • Keeps up-to-date with legislation and regulations relevant to rights and responsibilities and considers implications of these when negotiating, planning and undertaking work
Get the work done	1.2, 1.3, 1.4, 1.6, 1.7, 2.1-2.3, 2.5, 3.1, 3.2	• Plans, organises and implements tasks required to gather and maintain current information about career development • Systematically gathers and analyses information to make decisions about career development needs and services • Uses digital technologies to access and store information • Understands importance of monitoring and controlling access to digitally stored and transmitted information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED809 Identify and communicate trends in career development	BSBLED709A Identify and communicate trends in career development	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

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Links

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

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Assessment Requirements for BSBLED809 Identify and communicate trends in career development

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:

- research and analyse current economic, labour market, employment, career and vocational, educational and training trends
- identify choices and career development needs for individuals and target groups within a given context
- report and document management of research and career development materials
- comply with all relevant local, state/territory and national legislation, policies and practices.

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 client care and counselling techniques and processes in the context of career development services
- describe diversity and its potential effects on career choices
- outline human psychological development and needs in relation to careers development
- outline relevant policy, legislation, codes of practice and standards relevant to career development
- explain recruitment and selection processes in the context of career development services
- describe a range of data gathering and research techniques
- explain techniques used to analyse trends.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- office equipment and resources
- relevant legislation, regulations and codes of conduct
- relevant career development documentation and resources
- 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

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BSBLED810 Develop human capital

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 human capital; to consult on advantages of human capital with internal and external stakeholders or collaborative partners; and to develop and monitor capital value attained through implementation of development activities.

It applies to individuals working to enhance individual, team and organisational capabilities. While not all individuals will operate within an organisation that acknowledges and treats people as a capital asset, training and related people development activities may be advanced by considering principles and practices relating to the concept of human capital.

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

Unit Sector

Workforce Development – Learning and Development

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. Identify human capital	1.1 Analyse and evaluate principles of human capital theory and concepts 1.2 Assess factors involved in formation of human capital 1.3 Determine capital asset value of human resources in an organisation, an industry or region

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Determine relationship between human capital and organisational requirements
2. Consult on advantages of human capital development	2.1 Develop and prioritise strategies for deploying human capital development strategies to support the organisation' training needs profile in consultation with key stakeholders 2.2 Negotiate with key stakeholders on opportunities for collaborative human capital development projects
3. Develop and monitor human capital development	3.1 Complete human capital needs analysis and development planning according to organisational requirements 3.2 Analyse and interpret information and data on human capital gaps and forecasts 3.3 Implement options and strategies to develop, attract and retain talent 3.4 Implement options and actions to optimise asset value of human resources in relation to organisational strategic imperatives 3.5 Determine talent and develop potential of human capital required to meet organisational requirements 3.6 Promote capacity of organisation, team and individual employees to achieve strategic and personal advantage through effort to develop human capabilities

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, 2.1, 3.1, 3.2, 3.5	• Interprets textual information obtained from a range of sources and determines how content may be applied to develop human capital
Writing	1.1-1.4, 2.1, 3.1, 3.2, 3.5	• Integrates information and ideas from a range of sources to identify and communicate a human capital development strategy
Oral Communication	2.1, 2.2, 3.6	• Presents information and discusses ideas using vocabulary and features appropriate to the target groups • Uses listening and questioning skills to confirm and

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		clarify ideas
Numeracy	3.2	• Uses calculations and numerical analysis to analyse and interpret business technology, software applications and undertake statistical analysis
Navigate the world of work	1.4, 2.1, 3.1, 3.5	• Understands and adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	2.1, 2.2, 3.6	• Collaborates with others to seek and share opinions and negotiate agreement • Tailors communication to achieve its purpose, demonstrating understanding of the needs, interests of the audience
Get the work done	1.1-1.4, 2.1, 3.1-3.5	• Plans, organises and monitors tasks to implement a human capital development strategy • Uses problem-solving techniques to systematically gather, analyse and evaluate information about human capital requirements • Uses digital tools and technologies for analysis of data about human capital value

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLED810 Develop human capital	BSBLED710A Develop human capital	Updated to meet Standards for Training Packages Recoded to meet AQF Standards	Equivalent unit

Links

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

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Assessment Requirements for BSBLED810 Develop human capital

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:

- measure and analyse human capital data
- prepare documentation relating to data collection, analysis of human capital, and relationship to organisation's requirements
- prepare, implement, monitor and promote human capital development strategies to meet organisational requirements, with input from relevant stakeholders.

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 human capital development planning methodologies
- outline methods of valuing human capital
- explain the relationships between human capital and human resource development; human capital and training; human capital and intellectual and knowledge management
- identify data collection and human capital needs analysis methods
- list and describe organisational requirements relevant to human capital

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce learning and development field of work and include access to:

- organisational documentations
- office equipment and resources
- case studies and, where available, real situations

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- 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

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BSBLEG301 Apply knowledge of the legal system to complete tasks

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 complete a range of common legal administrative duties within the legal system.

It applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Identify the main roles and responsibilities of key bodies in the legal system	1.1 Identify the functions of the courts, regulatory bodies and other legal service providers 1.2 Identify the roles of key personnel in the legal industry 1.3 Explain and apply practical implications of relevant legal practice legislation in regard to own activities 1.4 Research identified gaps in knowledge
2. Identify key	2.1 Ensure the key functions of a firm are identified and can be

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ELEMENT	PERFORMANCE CRITERIA
personnel/sections within a legal firm and their functions, to complete routine administrative tasks	explained 2.2 Identify the key functions of all personnel/sections within a firm 2.3 Identify personnel responsible for authorisation of specific matters (e.g. partner for authorising movement of funds in trust accounts) 2.4 Use the correct names of personnel/sections in administrative tasks according to a firm's policies and procedures
3. Produce and despatch legal documentation	3.1 Ensure purpose of document/form, and the stage of the legal process to which it relates, can be explained 3.2 Access relevant information from the client file 3.3 Access precedent from firm's bank of forms/routine documentation or draft document according to firm's procedures 3.4 Attach file/matter number to all relevant documentation 3.5 Self-check document/form for accuracy and present it to the legal practitioner, within agreed timelines 3.6 Organise self or other person to despatch document in the appropriate manner 3.7 Document all activities, actions and outcomes and record time as required 3.8 File documentation correctly
4. Organise self or other to apply for certificates	4.1 Arrange, document/record timelines with designated person 4.2 Identify and locate supplier of certificate 4.3 Identify and advise applicable fees, taxes and rebates to client, if appropriate 4.4 Organise self or other person to apply for certificate using appropriate application forms and processes 4.5 Obtain record of application as appropriate 4.6 Facilitate legal practitioner's review of self or other's work 4.7 Organise self or other person to pursue appropriate follow-up action if certificates are not received on time or further information is required
5. Use court etiquette appropriate to the various courts	5.1 Use the appropriate manner of entering into and departing from the courts/tribunals 5.2 Use the appropriate manner of addressing the courts/tribunals

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ELEMENT	PERFORMANCE CRITERIA
	5.3 Use relevant legal language where appropriate 5.4 Identify and research gaps in knowledge of court etiquette

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	1.4, 5.4	• Uses investigative approaches to build and expand knowledge
Reading	1.1, 1.2, 1.4, 3.2-.3.5, 4.2-4.5, 5.4	• Interprets textual information from a range of sources to identify requirements • Proofreads texts to ensure accuracy of content and format
Writing	3.7, 4.1, 4.3, 4.4	• Prepares documents using legal terminology in a format and style appropriate to the audience
Oral Communication	1.3, 4.1, 4.3, 5.2, 5.3	• Presents information using language and structure appropriate to the audience and context • Uses listening and questioning skills to confirm understanding • Uses industry-specific vocabulary to address key personnel
Numeracy	3.7, 4.1, 4.3	• Calculates and records time allocated to tasks and applicable fees
Navigate the world of work	1.3, 2.1-2.4, 3.1, 3.3, 4.6, 5.1-5.3	• Understands own responsibility for adherence to organisational and legal requirements • Understands and adheres to protocols associated with own role
Interact with others	3.5, 4.1	• Collaborates with others to achieve required outcomes
Get the work done	3.2-3.8, 4.1-4.7	• Plans, organises and implements tasks required to achieve outcomes according to organisational requirements

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG301 Apply knowledge of the legal system to complete tasks	BSBLEG301A Apply knowledge of the legal system to complete tasks	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

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Assessment Requirements for BSBLEG301 Apply knowledge of the legal system to complete tasks

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:

- use relevant legal terminology to provide correct explanations in simple terms
- interpret client's file and select appropriate information for inclusion
- prepare relevant documents/ forms for lodgement or delivery in accordance with the firm’s procedures, relevant timelines and legislative requirements
- apply correct processes for the lodgement and receipt of certificates.

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 the scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- summarise the firm’s policies and procedures relevant to administrative tasks
- describe 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
  - court etiquette

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- explain the purpose of a range of certificates, documents and forms in relation to the area of law
- explain the term 'authorised signing parties’.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- workplace manuals, reference materials and sample forms
- workplace equipment and materials
- background information on courts, their jurisdiction and behavioural requirements
- sources of expert knowledge such as texts or legal practitioners
- appropriate legislation and regulations relevant to common legal matters
- 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

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BSBLEG302 Carry out search of the public record

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 complete a search of the public record. This involves planning and conducting the search, and obtaining and delivering the information according to instructions.

It applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Plan search	1.1 Arrange timelines for completing search and plan work 1.2 Identify appropriate information sources for completing the search and identify procedure for obtaining information from sources and clarify if necessary
2. Conduct search	2.1 Access and complete appropriate search request form accurately 2.2 Prepare monies to pay for search if necessary

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Organise self or other person to lodge search request with the appropriate person/official at correct search location 2.4 Obtain record of lodgement
3. Receive outcome of search	3.1 Arrange process of obtaining information with the appropriate person/official 3.2 Organise self or other person to collect information from external agency in the arranged manner 3.3 File all records of expense 3.4 Check information to see that it meets identified needs and take appropriate follow-up action with assistance if necessary
4. Deliver information	4.1 Deliver information intact to designated person 4.2 Identify and resolve difficulties within timelines 4.3 Document all activities, actions and outcomes and record time

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, 3.4	• Recognises and interprets textual information to determine job requirements • Checks information for accuracy
Writing	2.1, 4.3	• Completes forms legibly and correctly • Prepares documentation that communicates information clearly and effectively
Oral Communication	2.3, 3.2	• Presents information using language and structure appropriate to the audience and context • Uses listening and questioning skills to confirm understanding
Numeracy	1.1, 2.2, 4.3	• Calculates and records details of search fees and time estimates
Navigate the world of work	1.2	• Identifies and follows correct search procedures
Get the work	1.1, 1.2, 2.1, 2.3,	• Plans, organises and implements tasks to achieve

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done	2.4, 3.1-3.4, 4.1-4.3	required outcomes in a timely fashion • Responds to routine problems directly related to own role • Use digital tools and systems to access and enter information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG302 Carry out search of the public record	BSBLEG302A Carry out search of the public record	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

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Assessment Requirements for BSBLEG302 Carry out search of the public record

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:

- search information sources to meet identified needs accurately and appropriately
- provide clear and sufficient instructions and explanations to others
- maintain detailed file notes at each step of the search process, including a record of lodgement
- consulting the legal practitioner or supervisor proactively where difficulties cannot be resolved through standard procedures
- preparing monies to pay for searches
- maintain records of all activities, actions, outcomes, time and costs in accordance with the firm's policies and procedures.

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 the scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- explain firm's policies and procedures in relation to carrying out searches
- list accepted codes of conduct including those relating to:
  - privacy and confidentiality
  - the use of company property
  - duty of care
  - ethical behaviour
  - non-discriminatory practice

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  - conflict of interest
- explain compliance with reasonable direction
- discuss legal terminology in relation to the relevant area of law and the appropriate legal process
- identify the location and appropriate search procedures of relevant search sources, including on-line information locations
- discuss standard problems and resolutions in the sourcing and delivery of information
- outline the roles and responsibilities of internal and relevant external individuals/authorities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- legislation and regulations relevant to common legal matters
- background information on courts, their jurisdiction and behavioural requirements
- people with expert knowledge.

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

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BSBLEG303 Deliver court documentation

Modification History

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

Application

This unit describes skills and knowledge required to organise court documents for delivery, plan a schedule of delivery, deliver documents to the appropriate courts and return proof of document lodgement.

It applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Organise self or other to copy and collate court/tribunal documents	1.1 Identify documents for the same courts/tribunals 1.2 Organise self or other to copy and collate documents according to court requirements and a firm's policies and procedures 1.3 Attach file/matter number to copies of all relevant documents where appropriate 1.4 Appropriately file copies of all documents to be delivered
2. Plan court/tribunal	2.1 Establish times of delivery to ensure court/tribunal timelines

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ELEMENT	PERFORMANCE CRITERIA
delivery schedule	are met 2.2 Selected appropriate delivery method 2.3 Prepare monies for court filing fee and record disbursement appropriately
3. Organise self or other to deliver documents	3.1 Transport documents securely to court/tribunal 3.2 Hand over documents and monies if necessary for court filing fees to appropriate court official 3.3 Seek and record information regarding deficiency from court official if documents are deficient and cannot be lodged 3.4 Collect and file proof of lodgements and any associated documents appropriately 3.5 Appropriately resolve difficulties with lodgement or refer to designated person 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	1.1	• Recognises and interprets textual information to identify relevant information according to job requirements
Writing	2.3, 3.3	• Records information according to requirements
Numeracy	2.1, 2.3, 3.2	• Makes mathematical calculations to record periods of time, to calculate expenditure and to establish timelines
Navigate the world of work	1.2	• Identifies and follows required policies and procedures
Get the work done	1.1-1.4, 2.1, 2.2, 3.1-3.5	• Plans, organises and implements tasks to achieve required outcomes in a timely fashion • Responds to routine problems directly related to own role

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG303 Deliver court documentation	BSBLEG303A Deliver court documentation	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

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Assessment Requirements for BSBLEG303 Deliver court documentation

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:

- collate and lodge documentation for each court, with correct number of copies, signatures if necessary, and relevant attachments according to the firm's policies and procedures and the court's requirements
- maintain communication with designated person/s regarding actions, activities and outcomes
- plan court delivery schedule to accommodate agreed timelines, closing times of courts and the number of documents to be lodged
- prepare monies for court filing fees
- maintain records of all activities, actions, outcomes, time and costs in accordance with firm's policies and procedures.

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 scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- discuss the firm's policies and procedures in relation to handling of court documentation
- explain accepted codes of conduct including those relating to:
  - privacy and confidentiality
  - use of company property
  - duty of care
  - ethical behaviour
  - non-discriminatory practice

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  - conflict of interest
  - compliance with reasonable direction
- provide an overview of relevant; court processes, current legislation, legal processes and required documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- appropriate legislation and regulations relevant to common legal matters
- background information on courts, their jurisdiction and behavioural requirements
- people with expert knowledge.

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

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BSBLEG304 Apply the principles of confidentiality and security within the legal 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 use ethical behaviour when dealing with sensitive and confidential information in a legal environment.

It applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Work within accepted codes of conduct	1.1 Submit work for review and approval by the legal practitioner who delegated the task/s 1.2 Keep paperwork up to date and forward reports on the progress of matter/s to clients regularly according to instructions and relevant legislation 1.3 Ensure contact with the opposing party in legal disputes occurs only under the specific direction of the legal practitioner responsible for the matter

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Promptly communicate conflict of interest or potential conflict of interest in a legal matter to the legal practitioner responsible for the matter 1.5 Treat clients and fellow workers with respect 1.6 Take care to behave with honesty and integrity at all times 1.7 Direct trust account monies to legal practitioner for receipt
2. Follow confidentiality procedures	2.1 Assess information with regard to what is and what is not disclosable 2.2 Use discretion and judgement in all communications 2.3 Discuss client-related matters only within the confines of the practice and with appropriate personnel
3. Follow security procedures	3.1 Appropriately store and secure file related information, including electronically stored information 3.2 Hold discussions relating to client matters in a private location 3.3 Ensure all documents/exhibits relating to a file are locked away securely after use according to a firm's policies and procedures 3.4 Ensure all materials required by legislation to be stored for certain periods of time are clearly labelled and stored securely according to a firm's 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	Performance Criteria	Description
Reading	1.2, 2.1, 3.3, 3.4	• Recognises and interprets textual information to determine and to adhere to the firm's practices
Writing	1.1, 1.2, 3.4	• Legibly and correctly completes and updates documentation
Oral Communication	1.4, 2.3, 3.2	• Participates in spoken exchanges using structure and language to suit the audience • Uses active listening and questioning techniques to confirm understanding
Navigate the	1.2, 1.3, 1.4, 2.1-2.3,	• Complies with legislative obligations and follows ethical requirements, policies and procedures relevant

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world of work	3.2, 3.3, 3.4	to own role
Interact with others	1.1, 1.3, 1.5, 1.6, 2.2, 2.3, 3.2	• Follows accepted communication practices and protocols for submitting work or discussing client-related matters
Get the work done	1.1, 1.2, 1.4, 1.7, 3.1, 3.3, 3.4	• Plans, organises and implements tasks to achieve outcomes according to organisational requirements • Addresses problems by implementing standard procedures, referring problems outside own scope of responsibility to others • Uses digital systems and tools to access and store information, understanding the need for security of all data

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG304 Apply the principles of confidentiality and security within the legal environment	BSBLEG304A Apply the principles of confidentiality and security within the legal 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

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Assessment Requirements for BSBLEG304 Apply the principles of confidentiality and security within the legal 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:

- apply all relevant statutory legislation including the Code of Conduct, Legal Practice Act and The Judicial Act to ensure all work is performed with honesty and integrity
- identify and apply standard resolutions to breaches of confidentiality, security and conduct by self and others within the firm
- provide clear, relevant and correct assistance and advice to co-workers
- handle, store and secure all electronic and paper-based confidential information according to firm's policies and procedures
- seek advice from appropriate sources where the level of confidentiality required in a situation is unclear.

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 the scope of the legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- identify firm's policies and procedures
- outline accepted codes of conduct including those relating to:
  - privacy and confidentiality
  - use of company property
  - duty of care
  - ethical behaviour
  - non-discriminatory practice

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  - conflict of interest
  - compliance with reasonable direction
- summarise relevant court processes, current legislation, legal processes and required documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- legislation and regulations relevant to common legal matters
- background information on courts, their jurisdiction and behavioural requirements
- people with expert knowledge.

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

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BSBLEG305 Use legal terminology in order to carry out tasks

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 interpret and use legal terminology in order to undertake tasks.

It applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Use appropriate legal terminology in written and oral communication with internal and external parties	1.1 Use appropriate legal terminology in both written and oral communication with internal and external parties 1.2 Spell and pronounce legal terminology correctly and use in appropriate context when completing work tasks
2. Extend understanding of legal terminology	2.1 Identify gaps in knowledge and seek clarification through appropriate source or designated person 2.2 Identify and use abbreviations for commonly used legal terms

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ELEMENT	PERFORMANCE CRITERIA
	and associated processes where appropriate 2.3 Ensure questions relating to legal terminology can be answered and terms defined

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	2.1, 2.3	• Identifies gaps in knowledge and experience to assist with clarifying and extending understanding
Reading	2.2	• Interprets textual information to identify correct terms or processes
Writing	1.1, 1.2, 2.2	• Uses specific, accurate and relevant language to complete workplace documentation
Oral Communications	1.1, 1.2, 2.1, 2.2	• Uses industry-specific language correctly in spoken exchanges • Uses questioning and active listening to clarify understanding
Interact with others	1.1	• Follows accepted practices and protocols when communicating with internal and external parties
Get the work done	1.2, 2.3	• Plans and implements tasks to achieve requirements

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG305 Use legal terminology in order to carry out tasks	BSBLEG305A Use legal terminology in order to carry out tasks	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBLEG305 Use legal terminology in order to carry out tasks

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:

- proactively find and use opportunities to increase own knowledge of legal terminology
- carry out instructions containing commonly used legal terminology and abbreviations
- accurately identify and communicate the legal and financial consequences of misusing legal terminology
- use simple, non-legal language to explain legal terminology and processes to others
- use legal terminology appropriate to the situation when completing administrative tasks.

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 scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- outline the firm’s policies and procedures about the use of legal terminology
- summarise relevant court processes, current legislation and legal processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- workplace reference materials and texts
- people with expert knowledge.

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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

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BSBLEG306 Maintain records for time and disbursements in a legal practice

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 maintain time records and enter disbursements incurred.

It applies to individuals who work under supervision and apply a broad range of administrative competencies in a legal office work environment, using some discretion and judgement. In this role, individuals provide services to support legal practitioners and may provide technical advice and support to a team.

This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Record fee-earner time	1.1 Access timesheets submitted by fee-earners 1.2 Organise self or other to enter time recording into accounting system against relevant client or client matter file, or other relevant

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ELEMENT	PERFORMANCE CRITERIA
	codes such as training and marketing 1.3 Note irregularities and/or uncertainties and follow standard resolution procedures or alert designated person as appropriate 1.4 Make entries within agreed timelines
2. Enter disbursements incurred	2.1 Record details of disbursements accurately against relevant client or client master file according to a firm's policies and procedures 2.2 Note irregularities and/or uncertainties and ensure standard resolution procedures are followed, or alert designated person as appropriate 2.3 Allocate file/master number to all relevant documentation and file appropriately

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	• Interprets textual information to clarify data and to determine and adhere to workplace practices
Writing	1.3, 1.4, 2.2	• Uses clear, accurate and relevant language to complete workplace documentation
Oral Communications	1.3, 2.2	• Articulates clearly using specific and relevant language and appropriate tone to convey concerns
Numeracy	1.2, 2.1	• Uses mathematical equations to accurately calculate and record periods of time and expenditures for record-keeping processes
Navigate the world of work	1.3, 2.2	• Recognises and responds to organisational policies and procedures
Interact with others	1.3, 2.2	• Seeks to cooperate with others to achieve results in immediate work context
Get the work done	1.2-1.4, 2.1, 2.2, 2.3	• Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes • Takes responsibility for planning, sequencing and

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		prioritising tasks and own workload for efficiency and effective outcomes • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG306 Maintain records for time and disbursements in a legal practice	BSBLEG306A Maintain records for time and disbursements in a legal 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBLEG306 Maintain records for time and disbursements in a legal practice

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:

- demonstrate honesty and integrity in all financial dealings
- accurately enter timesheet data and disbursements into accounting system in accordance with firm's policies and procedures
- present relevant documentation to designated person/s for approval within agreed timelines
- consistently handle and administer trust accounts in accordance with firm's policies and procedures and legislative requirements
- apply standard procedures to resolve irregularities and/or uncertainties and/or alert designated person/s as appropriate.

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 scope of legal practitioner/support role and own responsibilities and obligations
- summarise relevant processes, current legislation, legal processes and documentation required in this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- appropriate legislation and regulations relevant to common legal matters

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- background information on courts, their jurisdiction and behavioural requirements
- people with expert knowledge.

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

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BSBLEG308 Assist in prioritising and planning activities in a legal practice

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 assist others within a legal practice to organise a legal schedule.

It 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.

This unit underpins all units of competency in the Legal Services stream.

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

Unit Sector

Administration – Legal Services Administration

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. Record file-related critical dates and times	1.1 Identify file-related deadlines 1.2 Record file-related deadlines according to a firm's policies and

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ELEMENT	PERFORMANCE CRITERIA
	procedures
2. Make and record appointments on behalf of designated person	2.1 Establish and clarify priorities of designated person/s 2.2 Ensure timelines for achievement of priorities are agreed and documented/recorded 2.3 Arrange and/or re-arrange appointments to a time or date which is more convenient for parties involved
3. Assist designated person/s to prepare for critical dates	3.1 Check records daily for upcoming appointments and commitments 3.2 Remind designated person/s of critical file dates 3.3 Prepare and distribute information meeting legislative requirements to designated person/s prior to critical dates 3.4 Monitor timelines regularly in consultation with designated person
4. Follow up outcomes of meetings or other activities	4.1 Plan and organise appropriate follow-up actions and activities in conjunction with designated person and relevant parties 4.2 Update file notes according to a firm's 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	Performance Criteria	Description
Reading	1.1, 1.2, 3.1, 3.4, 4.2	• Recognises and interprets textual data to identify and plan job deadlines to adhere to requirements
Writing	1.2, 2.2, 3.2-3.4, 4.1, 4.2	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	2.1, 2.2, 3.2, 3.4, 4.1	• Articulates clearly using specific terminology and relevant tone to convey requirements • Uses active listening and questioning techniques to confirm understanding
Numeracy	2.2, 2.3	• Uses basic mathematical formula to calculate and monitor work timeframes
Navigate the	1.2, 3.3, 4.2	• Takes personal responsibility for adherence to legal

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world of work		and regulatory requirements • Recognises and responds to organisational policies and procedures
Interact with others	2.1-2.3, 3.2-3.4, 4.1	• 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
Get the work done	2.3, 3.4, 4.1	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG308 Assist in prioritising and planning activities in a legal practice	BSBLEG308A Assist in prioritising and planning activities in a legal 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBLEG308 Assist in prioritising and planning activities in a legal practice

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:

- demonstrate an understanding of responsibility involved in making arrangements for others and legal consequences of not meeting critical timelines
- interact courteously and efficiently with other parties when making, confirming and changing appointments
- apply organisational skills and firm's procedures to accurately and legibly diarise all relevant details of appointments and file deadlines and follow up as required
- apply standard procedures to solve problems (such as double-bookings or non-attendances) promptly and satisfactorily
- create and maintain up-to-date, legible, accurate and accessible records of all activities and outcomes according to firm's policies and procedures.

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 scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- discuss firm's administrative systems and files
- adhere to codes of conduct including:
  - privacy and confidentiality
  - use of company property
  - duty of care
  - ethical behaviour

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- non-discriminatory practice
- conflict of interest
- compliance with reasonable direction.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- legislation and regulations relevant to common legal matters
- people with expert knowledge.

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

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BSBLEG403 Maintain trust 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 maintain trust monies related to specific files, under instruction of a legal practitioner.

It applies to individuals who work under supervision and 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.

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

Unit Sector

Administration – Legal Services Administration

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. Check that trust funds are adequate	1.1 Check relevant sources for information regarding disbursements and costs 1.2 Calculate and reconcile estimated disbursements and costs with available trust funds 1.3 Notify instructing legal practitioner where there are inadequate available funds 1.4 Notify client that further funds are required, where necessary,

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ELEMENT	PERFORMANCE CRITERIA
	according to organisation's policies and procedures
2. Draw cheques against trust account	2.1 Complete appropriate requisition form 2.2 Gain authorisation from instructing legal practitioner according to organisation's policies and procedures 2.3 Inspect cheques for accuracy and correct account source 2.4 Organise instructing legal practitioner to verify and sign cheques 2.5 Keep accurate records of all file-related disbursements and costs
3. Prepare documentation upon completion of legal matter	3.1 Collate relevant information and documentation from file 3.2 Reconcile monies remaining in trust account 3.3 Promptly investigate discrepancies or irregularities and take appropriate follow-up action

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, 2.1-2.3, 3.1, 3.3	• Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	1.3, 1.4, 2.1, 2.2, 2.4, 2.5, 3.1, 3.3	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	1.3, 1.4, 2.2, 2.4, 3.3	• Articulates clearly using specific language and appropriate tone suitable to audience to convey requirements • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.1-1.3, 2.3, 3.2	• Interprets numerical information and applies mathematical calculations to perform banking transactions and reconciliations
Navigate the world of work	1.4, 2.2	• Monitors adherence to organisational policies and procedures

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Interact with others	1.3, 1.4, 2.4	• 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
Get the work done	2.4, 2.5, 3.1, 3.3	• 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 • Recognises and addresses some complex problems of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG403 Maintain trust accounts	BSBLEG403B Maintain trust 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

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Assessment Requirements for BSBLEG403 Maintain trust 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:

- comply with organisation's trust accounting policies and procedures demonstrating honesty, integrity and accuracy in calculations and reconciliations
- prepare accurate and compliant documentation
- resolve or appropriately refer discrepancies and irregularities.

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 scope of own role
- explain legal terminology in relation to trust accounting
- list relevant Australian Taxation Office regulations, current legislation governing trust accounts, and legal processes
- explain required documentation for trust account transactions, and security, confidentiality and privacy requirements
- discuss statutory charges, taxes and other fees applicable to institutions
- summarise accepted codes of practice relevant to the workplace.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- legislation and regulations relevant to common legal matters

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- people with expert knowledge.

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

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BSBLEG413 Identify and apply the legal framework

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 research legal systems and jurisdictions within Australia.

It applies to individuals who use well-developed research skills to analyse and evaluate information from a variety of sources to provide support in a range of legal service settings.

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

Unit Sector

Administration – Legal Services Administration

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. Identify sources of law	1.1 Identify main institutions of government in Australia 1.2 Research sources of Australian law 1.3 Assess rules for resolving conflicts of laws
2. Identify and analyse relationships between the Federal and the states and territories governments	2.1 Identify legislative powers of Australian Federal Government and limits of that power 2.2 Analyse legislative powers of states and territories 2.3 Evaluate relationship between legislative powers of the Federal

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ELEMENT	PERFORMANCE CRITERIA
	Government and state and territory governments
3. Differentiate between civil and criminal proceedings	3.1 Identify and examine differences in law and procedures between civil and criminal proceedings 3.2 Analyse findings and determine which court would hear particular cases
4. Examine elements of adversary trial system	4.1 Identify main features of adversary system of trial 4.2 Evaluate these features and determine how they apply in the legal environment
5. Examine elements of precedent	5.1 Identify main features of principles of precedent 5.2 Analyse how precedent is applied in the legal environment 5.3 Examine and document outcomes of precedent
6. Examine legislation	6.1 Examine principles for reading and interpreting legislation 6.2 Apply principles for reading and interpreting legislation in the legal environment

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, 3.1, 3.2, 4.1, 4.2, 5.1-5.3, 6.1, 6.2	• Identifies, analyses and evaluates complex text to obtain information about federal, state and territory government systems and determine specific requirements within the legal environment
Writing	1.3, 2.2, 2.3, 3.2, 4.2, 5.2, 5.3	• Records results of investigations using clear and comprehensible language and grammar to convey detailed information and capture different perspectives
Navigate the world of work	1.2, 2.1-2.3, 3.1, 4.1, 4.2, 5.1-5.3, 6.1, 6.2	• Ensures knowledge of legislation, regulations, jurisdictions and procedures relevant to role is accurate, comprehensive and current
Get the work done	1.1, 2.1-2.3, 3.1, 3.2, 4.1, 4.2, 5.1-5.3, 6.1, 6.2	• Organises, plans and sequences tasks required to achieve required outcomes • Uses systematic, analytical processes in non-routine situations, gathering relevant information and identifying

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		and evaluating options

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG413 Identify and apply the legal framework	BSBLEG413A Identify and apply the legal framework	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

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Assessment Requirements for BSBLEG413 Identify and apply the legal framework

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:

- explain differences between Australian law making institutions
- identify appropriate institutions to hear civil versus criminal proceedings
- explain how adversarial system of trial operates
- explain application and outcomes of principles of precedent
- read and interpret legislation.

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:

- list institutions and main features of the Australian legal system
- identify legal terminology in relation to areas of practice of law and relevant legal processes
- outline methods used to identify appropriate information about sources of Australian law
- list scope of responsibilities in context of legal framework.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- legislation and regulations relevant to common legal matters
- people with expert knowledge.

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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

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BSBLEG414 Establish and maintain a file in legal 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 manage the conduct of a file under the instruction of a designated individual.

It applies to individuals who apply well established, sound theoretical knowledge in the provision of administrative support in legal services.

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

Unit Sector

Administration – legal administration

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. Initiate preliminary file activities	1.1 Arrange meeting with designated individual to discuss new file, and to plan and prioritise preliminary work 1.2 Obtain details of the legal matter from the client according to organisation's policies and procedures 1.3 Develop a quote in line with organisation's fee structure and forward it to instructing legal practitioner for approval 1.4 Forward quote and instructions for establishing a trust account to client on behalf of instructing legal practitioner

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Clarify terms of engagement with instructing legal practitioner and client and ensure expectations are agreed upon and documented 1.6 Prepare initial file documentation
2. Carry out conflict of interest check	2.1 Organise self or other person to carry out conflict of interest check 2.2 Record results of conflict of interest check in preliminary file notes, and discuss and resolve areas of potential conflict
3. Open file	3.1 Locate, access and extract relevant information for initiating files 3.2 Select and brief support staff to assist on file, in consultation with designated individual 3.3 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 3.4 Plan work in conjunction with designated individual and allocate resources
4. Contact other persons about the file	4.1 Undertake liaison with other persons and obtain statements if necessary 4.2 Undertake liaison with experts where appropriate 4.3 Update file notes detailing activities, actions and outcomes and record time
5. Undertake legal process according to plan	5.1 Carry out legal process as planned with designated individual 5.2 Maintain information flow to designated individual on progress of matter 5.3 Immediately refer issues or problems outside own range of responsibility to designated individual for resolution 5.4 Monitor trust account to ensure sufficient monies are present and contact instructing legal practitioner to facilitate the transfer of additional funds if necessary 5.5 Keep client up-to-date on matter through progress reports and, where necessary, meetings with designated individual
6. Facilitate file administration and closure	6.1 Organise self or other person to reconcile time records with costing 6.2 Organise self or other person to undertake final costing 6.3 Organise self or other person to prepare invoice

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ELEMENT	PERFORMANCE CRITERIA
	6.4 Arrange meeting with designated individual to review final invoice and relevant documentation in order to facilitate sign-off before forwarding to client 6.5 Update and complete file notes 6.6 Ensure final accounting of trust account and resolve outstanding disbursements 6.7 Close and archive file according to organisation's 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	Performance Criteria	Description
Reading	1.2, 1.3, 1.5, 2.1, 3.1, 5.2, 5.4, 6.4	• 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	1.2, 1.5, 1.6, 2.2, 3.3, 3.4, 4.1, 4.3, 5.1, 5.2, 5.5, 6.5	• 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	1.1, 1.2, 1.5, 2.2, 3.2, 4.1, 4.2, 5.4, 5.5, 6.4	• 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	1.2, 1.3, 5.4, 6.1, 6.2, 6.3. 6.4	• 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
Navigate the world of work	1.2, 1.3, 2.1, 2.2, 5.3, 5.4, 6.7	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with	2.1, 3.3, 5.1, 5.2,	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own

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others	5.3, 6.1, 6.2, 6.3	role
Get the work done	1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 2.1, 2.2, 3.3, 3.4, 5.4, 6.1, 6.2, 6.3	• 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 • Uses familiar digital technologies and systems to access information, enter and store data, present information and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG414 Establish and maintain a file in legal services	BSBLEG414A Establish and maintain a file in legal 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

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Assessment Requirements for BSBLEG414 Establish and maintain a file in legal 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:

- document and file information according to organisation's policies, procedures and legal requirements, and within agreed timeframes
- apply organisation's financial systems and procedures according to legal requirements and within agreed timeframes
- provide appropriate information, advice and assistance to clients within own scope of responsibility
- explain legal and legislative requirements underlying actions.

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 scope of role and responsibilities, and obligation to refer matters to supervisor
- outline organisation's policies and procedures, including quotation and invoicing procedures
- list 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
- identify legal terminology, including that specific to area of law

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- outline archiving procedures and appropriate file retention periods
- outline relevant court processes, current legislation, legal processes and required documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- workplace manuals and reference materials
- information on courts, their jurisdiction and behavioural requirements
- people with expert knowledge
- legislation and regulations relevant to common legal matters.

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

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BSBLEG415 Apply the principles of contract law

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 analyse and evaluate information from a variety of sources and supply solutions to contractual issues in a legal environment.

It 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

Administration – Legal Services Administration

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. Determine nature and meaning of contract	1.1 Access sources of legal information on nature and meaning of contract 1.2 Distinguish between common law and legislation in contract 1.3 Assess significance of contracts and contract law in business, and document outcomes of this assessment
2. Determine principles of contract law	2.1 Define legal principles governing simple contracts 2.2 Identify and document key elements of a simple contract matter

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ELEMENT	PERFORMANCE CRITERIA
3. Enhance professional practice through application of relevant principles of contract law	3.1 Assess a legal matter involving contractual issues by applying principles of contract law 3.2 Analyse and evaluate key issues 3.3 Review analysis with designated person
4. Distinguish between a contract being discharged or breached	4.1 Specify procedures for discharge of contracts 4.2 List available remedies for breach of contract 4.3 Apply procedures for discharge of contracts to workplace legal matter 4.4 Apply identified remedies to a relevant workplace legal matter

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, 3.1, 4.1	• Identifies, analyses and evaluates complex text to clarify contractual definitions, principles and legal requirements
Writing	1.3, 2.2, 3.2, 4.1-4.4	• 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	3.3	• Articulates key issues, identified remedies and organisational procedures using detailed language and suitable tone appropriate to audience and environment • Elicits views and opinions of others by active listening and questioning
Navigate the world of work	2.1, 3.1, 4.1, 4.3, 4.4	• Understands own legal rights and responsibilities and is extending understanding of general legal principles applicable across work contexts • Adheres to organisational policies and procedures • Understands nature and purpose of own role and associated responsibilities and how it contributes to work of others in immediate work context
Get the work	1.2, 1.3, 3.2, 4.3, 4.4	• Plans and implements tasks required to achieve organisational requirements

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done		• Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of information into account • Uses formal analytical thinking techniques to identify issues and generate possible solutions, seeking input from others as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG415 Apply the principles of contract law	BSBLEG415A Apply the principles of contract law	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

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Assessment Requirements for BSBLEG415 Apply the principles of contract law

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 principles of contract law
- demonstrate the steps for discharge of a contract.

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:

- define commonly used legal terminology, institutions and main features of Australian legal system
- outline methods used to identify appropriate information sources of Australian law
- explain nature, aims and rationale of contracts, including agreements, intention to create legal relations, consideration, and capacity to contract
- explain remedies for breach of contract
- describe illegal and void contracts
- explain privacy of contract and assignment of contract.

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

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

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- office equipment and resources
- legislation and regulations relevant to contract law
- sources of information about contract law.

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

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BSBLEG416 Apply the principles of the law of torts

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, analyse, and evaluate tort law matters, and apply the principles of the law of torts.

It applies to individuals who provide administrative support in a range of legal service settings.

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

Unit Sector

Administration – Legal Services Administration

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. Define nature and meaning of law of torts	1.1 Access sources of legal information on nature and meaning of law of torts 1.2 Distinguish tort from crime, breach of contract, or other legal obligations
2. Identify principles of law of torts	2.1 Define legal principles in application of law of torts 2.2 Determine key elements of law of torts matters
3. Apply relevant	3.1 Assess legal matters relevant to possible torts

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ELEMENT	PERFORMANCE CRITERIA
elements of tort	3.2 Analyse and evaluate information 3.3 Extract and document information relevant to the particular matter
4. Identify remedies for breaches of law of torts	4.1 Identify circumstances giving rise to liability in law of torts 4.2 Identify and document remedies applicable to breach 4.3 Submit findings to designated person 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	Performance Criteria	Description
Reading	1.1, 1.2, 3.1-3.3, 4.1, 4.2	• 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	3.3, 4.2	• Documents research findings, analyses and evaluations using format, language and structure suitable to audience and environment
Oral Communication	1.1, 4.3	• Uses questioning and listening techniques to elicit information • Presents factual information and recommendations using specific and relevant language and features
Navigate the world of work	4.3	• Takes personal responsibility for following organisational policies and procedures
Interact with others	4.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.2, 3.1-3.3, 4.1, 4.2	• Plans, organises and implements tasks required to achieve organisational outcomes • Makes a range of critical and non-critical decisions in relatively complex situations, analysing a range of factors to inform decision-making • Uses formal analytical thinking techniques to identify issues and generate possible solutions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG416 Apply the principles of the law of torts	BSBLEG416A Apply the principles of the law of torts	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

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Assessment Requirements for BSBLEG416 Apply the principles of the law of torts

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:

- locate legal information from a range of sources
- document central tenets and applications of torts law
- provide a documented explanation of burden in law of torts.

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:

- define commonly used legal terminology, institutions and main features of Australian legal system
- outline methods used to identify appropriate information about sources of Australian law
- identify torts relating to:
  - negligence
  - negligent misrepresentation
  - person, goods and land
- explain meaning of:
  - occupier’s liability
  - vicarious liability
- explain law of defamation.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and materials
- legislation and regulations relevant to tort law
- sources of information on tort law.

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

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BSBLEG417 Apply the principles of evidence law

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 analyse and evaluate key issues associated with evidence law in a legal environment.

It applies to individuals who use well-developed skills and a broad knowledge base to provide administrative support in a legal service setting.

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

Unit Sector

Administration – Legal Services Administration

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. Define nature and meaning of 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. Identify principles of evidence law	2.1 Define and document legal principles governing evidence 2.2 Determine key concepts underpinning evidence law

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ELEMENT	PERFORMANCE CRITERIA
3. Enhance professional practice through application of relevant principles of evidence law	3.1 Apply principles of evidence to relevant legal matters arising in the workplace 3.2 Analyse and evaluate key issues 3.3 Review analysis with designated person
4. Identify relevant and admissible evidence	4.1 Distinguish relevant and admissible evidence in context of a legal matter 4.2 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.1, 3.2, 4.1, 4.2	• 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	2.1, 3.2	• 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	3.3	• Uses questioning and listening techniques to elicit information • Presents results findings clearly and concisely using appropriate language, terminology and tone
Navigate the world of work	1.2, 1.3, 2.1, 2.2, 3.1, 4.1	• Appreciates implications of legal responsibilities related to own work and recognises specific legal principles applicable in evidence law
Get the work done	1.1, 2,.1, 3.1, 3.2, 4.1, 4.2	• Plans and organises data collection tasks • Uses systematic analytical process to access, investigate and compare information about legal matters

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG417 Apply the principles of evidence law	BSBLEG417A Apply the principles of evidence law	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

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Assessment Requirements for BSBLEG417 Apply the principles of evidence law

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 principles of evidence law
- demonstrate application of admissible law in a range of contexts.

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:

- define commonly used legal terminology, institutions and main features of Australian legal system
- outline methods used to identify appropriate information about sources of Australian law
- explain 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

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources

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- legislation and regulations about evidence law
- sources of information on evidence law.

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

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BSBLEG418 Produce complex legal documents

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 produce complex legal documents that meet organisational and legislative requirements using advanced features of relevant software packages.

It 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

Administration – Legal Services Administration

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 document design and structure	1.1 Identify requirements of task in line with instructions 1.2 Select software appropriate to task 1.3 Determine document design and structure 1.4 Design and structure document to meet legislative requirements 1.5 Review and update existing precedent documents
2. Develop precedents for	2.1 Develop and use precedents to ensure consistency of design

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ELEMENT	PERFORMANCE CRITERIA
document design	and layout 2.2 Evaluate and amend templates to ensure document requirements can be met 2.3 Recommend improvements to design and/or structure of existing documents and facilitate a review process of suggested improvements
3. Prepare to produce documents	3.1 Prepare documents using appropriate and available precedent documents according to organisation's policies and procedures 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 to produce completed documents within agreed timelines
4. Prepare to print documents	4.1 Print documents as required 4.2 Arrange review of documents with designated person 4.3 Undertake final printing of documents
5. Save file and exit system	5.1 Save and store document in appropriate folder 5.2 Close file and exit application programs 5.3 Make back-up copies of file according to specified procedures 5.4 File and store data according to organisation's 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	Performance Criteria	Description

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Reading	1.1, 1.3, 1.5, 2.1, 2.2, 3.3-3.5, 3.7, 5.3, 5.4	• 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
Writing	2.2, 2.3, 3.1, 3.2, 3.6, 3.7	• Develops and amends documents to accurately display relevant information using a design and structure appropriate to task and audience
Oral Communication	1.1, 1.3, 2.3, 4.2	• 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
Navigate the world of work	1.4, 3.1, 5.3, 5.4	• Monitors adherence to organisational policies and procedures and legislative requirements
Interact with others	2.3	• 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, 1.3, 2.1-2.3, 3.2, 3.3, 3.7, 4.1-4.3, 5.1-5.4	• Uses planning and organisational skills to perform tasks within designated timelines • Makes a range of decisions in relatively complex situations, taking a range of factors into account • Uses analytical thinking techniques to identify issues and generate possible solutions, seeking input from others as require • Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes • 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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG418 Produce complex legal documents	BSBLEG418A Produce complex legal documents	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

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Assessment Requirements for BSBLEG418 Produce complex legal documents

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:

- demonstrate that confidentiality and security of information are maintained
- design and produce accurate documents that conform to specified standards within agreed timelines
- use advanced functions of at least one software package, or integrate functions of at least two software packages, in document production.

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 organisation's policies and procedures in relation to precedent design
- outline relevant legislation, rules, regulations, and codes of practice
- explain the process for developing and testing templates.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- relevant industry software packages
- organisational policies and procedures
- relevant legislation and regulations
- appropriate sources of information.

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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

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BSBLEG510 Apply legal principles in family law matters

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 legal principles within the family law framework.

It 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

Administration – Legal Services Administration

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. Identify laws related to family law	1.1 Source legislation, regulations and policies relevant to family law 1.2 Interpret key legal principles as they apply to family law matters

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ELEMENT	PERFORMANCE CRITERIA
2. Apply principles of family law in relation to marriage dissolution, property settlement and dealing with minors	2.1 Identify and apply steps involved in marriage dissolution 2.2 Establish facts about proposed dissolution and client interests 2.3 Determine if agreement has been reached before filing on all issues regarding property, support and parenting
3. Identify and prepare appropriate costing documentation	3.1 Identify legislative and regulatory requirements for costing legal services 3.2 Determine types of costs that apply 3.3 Prepare relevant costing documentation according to organisation's policies and procedures
4. Prepare and despatch documentation	4.1 Organise self and others to file documentation and administration in accordance with organisation's policies and procedures 4.2 Obtain and forward relevant background documentation to designated person for review 4.3 Prepare and present relevant documents to designated individual for review and sign-off

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, 3.1-3.3, 4.1, 4.3	• Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	2.1-2.3, 3.3, 4.3	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	2.2, 2.3	• 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	3.1, 3.2	• Interprets numerical information and makes mathematical calculations to determine maintenance

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		obligations
Navigate the world of work	1.2, 3.1, 3.3, 4.1	• Monitors adherence to organisational policies and procedures • Keeps up-to-date with relevant legislation or regulations relevant to own responsibilities and considers the implications of these when planning and undertaking work
Interact with others	4.2, 4.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 2.1, 2.2, 2.3, 3.2, 4.1, 4.2, 4.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG510 Apply legal principles in family law matters	BSBLEG510A Apply legal principles in family law matters	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

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Assessment Requirements for BSBLEG510 Apply legal principles in family law matters

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:

- 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
- complete and present documentation for review.

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 relevant court processes for family law matters
- outline legal processes required in this role
- describe family law as it applies to scope of workplace responsibilities
- outline documentation required in family law matters
- summarise the organisation’s required policies and procedures pertinent to this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- appropriate legislation and regulations relevant to family law and common legal matters
- workplace reference materials
- background information on courts, their jurisdiction and behavioural requirements

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- 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

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BSBLEG511 Apply legal principles in criminal law matters

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 carry out administrative tasks within criminal law frameworks.

It 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

Administration – Legal Services Administration

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. Identify laws related to criminal law	1.1 Source legislation, regulations and policies relevant to criminal law 1.2 Interpret key legal principles as they apply to criminal law matters

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ELEMENT	PERFORMANCE CRITERIA
2. Enhance professional practice through application of relevant principles of criminal law	2.1 Identify different criminal matters, defences, types of hearings, criminal jurisdictions and types of courts and explain relationships between them 2.2 Receive calls from client or police and communicate details of client charge and bail status to legal practitioner
3. Draft and process documents involved in criminal law matters	3.1 Prepare letters and other documents for legal practitioner for review and sign-off according to organisation's policies and procedures 3.2 Determine types of costs in accordance with legislative and regulatory requirements for costing legal services 3.3 Ensure documents are despatched according to instructions 3.4 Facilitate liaison and communication between the parties 3.5 Maintain files, noting critical dates and reminders

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, 3.2, 3.3	• Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	2.1, 3.1, 3.4	• Uses clear, accurate and relevant language to organise, liaise, record and update information and complete workplace documentation according to organisation’s protocols
Oral Communication	2.2, 3.3, 3.4	• Provides clear explanations using language and features appropriate to the audience • Employs listening and questioning techniques to confirm understanding
Numeracy	3.2	• Interprets numerical information and makes mathematical calculations to determine legal services costs
Navigate the world of work	1.2, 3.1, 3.2	• Takes full responsibility for following policies, procedures and legislative requirements

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Interact with others	2.2, 3.1, 3.4	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 2.1, 3.1-3.3, 3.5	• Plans, prioritises and completes complex tasks according to organisational and legal requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG511 Apply legal principles in criminal law matters	BSBLEG511A Apply legal principles in criminal law matters	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

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Assessment Requirements for BSBLEG511 Apply legal principles in criminal law matters

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:

- prepare appropriate documentation according to organisation's policies and procedures and provide it to required people at the appropriate time
- communicate with clients in a sensitive, discreet and professional manner
- conduct work according to legislative requirements and within accepted codes of conduct.

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 the scope of job role in the context of legislation, regulations and codes of practice
- explain relevant court processes
- summarise current criminal law legislation
- outline documentation required in criminal law matters
- identify the organisation's required policies and procedures pertinent to this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- workplace policies and procedures and reference materials
- background information on courts, their jurisdiction and behavioural requirements
- appropriate legislation and regulations relevant to common legal matters.

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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

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BSBLEG512 Apply legal principles in property law matters

Modification History

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

Application

This unit describes skills and knowledge required in the conduct and administration of straightforward property law matters.

It 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

Administration – Legal Services Administration

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. Define nature of property law	1.1 Source legislation, regulations and policies relevant to property law 1.2 Outline difference between real and personal property and make distinctions about their method of transfer

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify titles of ownership and their legal implications 1.4 Identify types of mortgages, their legal implications, processes for obtaining and discharging them, and rights of mortgagees
2. Enhance professional practice through application of relevant principles of property law matters	2.1 Identify parties involved in buying and selling a property and their respective roles 2.2 Identify steps involved in buying and selling a property
3. Prepare documentation associated with property law matters, including costing	3.1 Obtain relevant documents from authorities and service providers 3.2 Ensure documentation associated with sale or purchase of property is prepared according to organisation's policies and procedures 3.3 Determine types of costs in accordance with legislative and regulatory requirements for costing legal services 3.4 Draft leases according to instructions 3.5 Identify duties of lessor and lessee 3.6 Ensure documentation is reviewed and signed off by designated person
4. Facilitate file administration	4.1 Arrange meetings and conferences as appropriate 4.2 Register and lodge relevant documents with land titles and other relevant government agencies 4.3 Check documentation and maintain file according to organisation's policies and procedures 4.4 Attend to post-settlement 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 Criteria	Description
Reading	1.1-1.4, 2.1, 2.2, 3.1-3.5, 4.3	• Interprets numerical and complex legal information from relevant sources to determine and adhere to requirements

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		• Checks documents for accuracy and consistency of information
Writing	3.2, 3.4, 4.2	• Uses clear, accurate and relevant language to organise, liaise, record and update information and complete workplace documentation according to organisation's protocols
Oral Communication	2.1, 4.1	• Provides instructions or information using relevant language suitable to diverse audiences • Employs listening and questioning techniques to confirm understanding
Numeracy	3.3	• Interprets numerical information to determine costs and makes calculations to record duties and transact monies
Navigate the world of work	1.2, 1.3, 1.4, 3.1-3.3	• Takes full responsibility for following policies, procedures and legislative requirements
Interact with others	3.1, 3.6	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3, 1.4, 3.1-3.6, 4.1-4.4	• Plans, sequences and implements tasks within timelines and according to required procedures • Uses familiar digital technologies and systems to access and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG512 Apply legal principles in property law matters	BSBLEG512A Apply legal principles in property law matters	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

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Assessment Requirements for BSBLEG512 Apply legal principles in property law matters

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:

- 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 organisational and legislative 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.

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 the scope of job role in context of legislation, regulations and codes of practice
- explain relevant court processes
- summarise current property law
- outline legal processes required in this role
- outline documentation required in property law
- discuss the organisation’s policies and procedures pertinent to this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- appropriate legislation and regulations relevant to property law and common legal matters

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- relevant workplace policies and procedures and reference materials
- background information on courts, their jurisdiction and behavioural requirements
- 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

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BSBLEG513 Apply legal principles in corporation law matters

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 business structures and prepare associated documentation within corporation law frameworks.

It 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

Administration – Legal Services Administration

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. Identify laws and principles of corporation law	1.1 Source knowledge of corporation law and related legislation 1.2 Identify different types of business structures and clearly outline their structure, personnel, legal obligations, establishment procedures and purpose 1.3 Identify differences between proprietary companies and public

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ELEMENT	PERFORMANCE CRITERIA
	companies, and clearly outline the legal obligations, criteria and purpose of each
2. Enhance professional practice through application of relevant corporation law principles to business structures	2.1 Identify consequences of incorporation 2.2 Identify structure, contents and purposes of an organisation's memorandum of association and articles of association 2.3 Identify other specific activities relevant to corporation law
3. Undertake administrative tasks associated with corporation law	3.1 Prepare forms, documents and annexures at appropriate time, present to designated person for review and sign-off, and lodge with appropriate government department 3.2 Make arrangements for documents to be despatched, signed and witnessed by appropriate parties 3.3 Provide assistance in preparing company prospectus where required 3.4 Arrange meetings as necessary to discuss nature of debenture and assets underwriting the charge 3.5 Undertake appropriate searches and obtain search documents from relevant agencies 3.6 Prepare forms and documents related to administration of charges at appropriate time, present to designated person for review and sign-off, and lodge with appropriate government department 3.7 Determine types of costs for legal services in accordance with legislative and regulatory requirements 3.8 Make arrangements for documents to be despatched, signed and witnessed by appropriate parties

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, 2.1-2.3, 3.5, 3.7	• Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information • Checks documents for accuracy and clarity of meaning

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Writing	1.2, 1.3, 3.1, 3.3, 3.5, 3.6, 3.8	• Uses clear, accurate and relevant language to record information and to complete workplace documentation
Oral Communication	3.3, 3.4, 3.8	• 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	3.7	• Interprets numerical information to determine costs
Navigate the world of work	1.2, 1.3, 2.1-2.3, 3.7	• Identifies implications of law to organisational policies and procedures • Keeps up-to-date with relevant legislation or regulations and considers these when planning and undertaking work
Interact with others	3.1-3.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role • Assists others as part of familiar workplace activities
Get the work done	1.1-1.3, 2.1-2.3, 3.3-3.6, 3.8	• Plans, organises and implements work activities that comply with organisational and legislative requirements, including timelines • Evaluates information to decide on relevance to organisation

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG513 Apply legal principles in corporation law matters	BSBLEG513A Apply legal principles in corporation law matters	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

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Assessment Requirements for BSBLEG513 Apply legal principles in corporation law matters

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:

- prepare and lodge accurate and appropriate documentation at required stages of legal process
- conduct all duties according to legislative and organisational requirements
- provide assistance to others to achieve joint outcomes when necessary.

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 scope of job role in the context of relevant legislation, regulations and codes of practice
- explain relevant court processes
- summarise current corporation law principles
- outline legal processes required in this role
- outline documentation required in corporation law matters
- discuss organisation’s required policies and procedures pertinent to this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- appropriate legislation and regulations relevant to corporation law and common legal matters
- workplace policies and procedures and reference materials

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- background information on courts, their jurisdiction and behavioural requirements
- 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

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BSBLEG514 Assist with civil procedure

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 assist in civil procedure contexts and processes of litigation.

It 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

Administration – Legal Services Administration

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. Identify laws and structures related to civil procedure	1.1 Identify jurisdictional limits of federal, state and territory courts and tribunals in relation to dispute resolution 1.2 Source legislation, regulations and policies relevant to civil procedure 1.3 Identify roles of court personnel

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ELEMENT	PERFORMANCE CRITERIA
2. Assess matter in dispute	2.1 Liaise with designated individual about the matter in dispute 2.2 Prepare relevant costing documents 2.3 Identify and consider options to litigation
3. Prepare and assist in litigation proceedings	3.1 Determine steps prior to litigation 3.2 Obtain and prepare relevant documentation for designated person according to organisation's policies and procedures
4. Assist with interlocutory process	4.1 Identify purpose of discovery and associated legal obligations 4.2 Undertake administrative tasks associated with discovery 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	1.1-1.3, 2.3, 3.1, 3.2, 4.1, 4.2	• 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	2.2, 3.2	• Uses clear, accurate and relevant language to organise and record information and complete workplace documentation
Oral Communication	2.1	• 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	2.2	• Uses mathematical calculations to determine costs
Navigate the world of work	1.1, 1.2, 3.2, 4.1	• 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

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Get the work done	1.1, 1.2, 1.3, 2.1, 2.3, 3.1, 4.1, 4.2	• Plans, sequences and implements tasks according to legislative and organisational requirements • Evaluates information to decide on relevance to situation

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG514 Assist with civil procedure	BSBLEG514A Assist with civil procedure	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

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Assessment Requirements for BSBLEG514 Assist with civil procedure

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:

- assess matters in dispute and 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.

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 alternative methods of dispute resolution
- explain what purpose of discovery means in civil matters
- outline documentation required for civil procedure matters
- identify the organisation’s policies and procedures pertinent to civil procedures
- summarise the legislation and accepted codes of practice relevant to civil procedure matters
- outline the role of the courts and associated personnel for civil matters.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- legislation and regulations relevant to civil law and common legal matters
- workplace policies and procedures and reference materials
- background information on courts, their jurisdiction and behavioural requirements

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- 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

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BSBLEG515 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 1.0.

Application

This unit describes the skills and knowledge required to prepare wills and probates, powers of attorney and other deceased estate documentation.

It 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

Administration – Legal Services Administration

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. Identify laws and principles of wills and probate law	1.1 Source legislation, regulations and policies relevant to wills, probate and administration 1.2 Interpret key principles as they apply to wills, probate and administration matters
2. Enhance professional	2.1 Establish relevant information in context of the particular

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ELEMENT	PERFORMANCE CRITERIA
practice through application of relevant principles of wills and probate law	matter 2.2 Ensure client's needs are met, obtain testamentary, solicitor, deceased estate instructions and other details
3. Prepare and execute documentation	3.1 Draft documentation according to instructions of designated individual 3.2 Forward documentation to designated individual for review and sign off in accordance with organisation's policies and procedures
4. Process documentation	4.1 Ensure documents are despatched to appropriate agencies according to instructions 4.2 Determine types of costs in accordance with legislative and regulatory requirements for costing legal services 4.3 Facilitate liaison and communication with the parties 4.4 Maintain files, noting critical dates and reminders

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, 3.2, 4.1, 4.2, 4.4	• Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	2.1, 2.2, 3.1, 4.4	• Uses clear, accurate and relevant language to organise and record information and complete documentation
Oral Communication	2.1, 2.2, 4.3	• 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	4.2	• Uses straightforward mathematical calculations to determine costs
Navigate the world of work	1.1, 1.2, 2.2, 3.2, 4.1, 4.2	• Adheres to organisational policies and procedures • Keeps up-to-date with relevant legislation, regulations and policies and considers implications of these when

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		planning and undertaking work
Interact with others	2.1, 2.2, 3.2, 4.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.2, 2.1, 2.2, 4.1, 4.4	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLEG515 Apply legal principles in wills and probate matters	BSBLEG515A Apply legal principles in wills and probate matters	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

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Assessment Requirements for BSBLEG515 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 1.0.

Performance Evidence

Evidence of the ability to:

- determine and obtain information required to handle will and probate matters
- prepare appropriate documentation, including wills, probate and other deceased estate documentation
- conduct all work according to legislative 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 the scope of the job role in the context of legislation, regulations and codes of practice
- summarise the organisation’s policies and procedures for wills and probate matters
- outline the roles and responsibilities of parties involved in wills and probate matters
- briefly outline the forms, documents and annexures relevant to wills and probate.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- appropriate legislation and regulations relevant to wills and probate matters
- workplace policies and procedures and reference materials.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• 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	• 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	• Understands and operates within organisational procedures and policies
Interact with others	1.1, 1.5, 2.2, 3.1-3.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own

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		role
Get the work done	1.1, 1.2	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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 Medicate 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	• 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	• Records and uses appropriate written communication when preparing medical accounts and in various other medical administration contexts
Oral	1.1, 1.2, 4.4	• Uses everyday language with patients to provide advice relating to the fee structure for different

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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	• 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	• 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	• 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

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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

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- 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

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BSBMED303 Maintain patient records

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 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify and clarify own role and procedures for patient recordkeeping	1.1 Determine own role and responsibilities within patient recordkeeping system through consultation with relevant personnel or via organisational policy and procedures manual 1.2 Access documented procedures for patient recordkeeping system and read for understanding 1.3 Seek clarification with relevant personnel of unclear or

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ELEMENT	PERFORMANCE CRITERIA
	ambiguous procedures
2. Access patient records	2.1 Gain access to patient records to facilitate patient visit 2.2 Check currency and accuracy of patient demographic and personal details 2.3 Create new records according to enterprise protocols 2.4 Check records following patient visits, for practitioners' instructions related to follow-up action 2.5 Store patient files following organisational policy and procedures
3. Help maintain records	3.1 Make checks of patient files 3.2 Carry out archiving of patient files as required 3.3 Transfer patient files to another health facility upon appropriate request for patient information
4. Monitor and review own role	4.1 Monitor and review own role and responsibilities in maintaining patient records to identify opportunities for improvements to system and own work practices 4.2 Make recommendations to relevant personnel for improvements to the established procedures and processes for maintaining patient 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, 1.2, 1.3, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 4.2	• Recognises and interprets a range of everyday workplace information including organisational protocols and medical data
Writing	2.3, 3.2, 3.3, 4.2	• Creates and maintains records according to organisational requirements • Documents recommendations for improved processes using simple vocabulary and required structure
Oral	1.1, 1.3, 4.2	• Uses specific vocabulary and active listening and questioning techniques to confirm understanding

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Communication		
Navigate the world of work	1.1, 2.3, 2.5	• Identifies and works within own roles and responsibilities according to organisational procedures and protocols
Interact with others	1.1, 1.3, 4.2	• Selects the appropriate form, channel and mode of communication for a specific purpose related to own work • 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	• Plans and sequences workload to ensure tasks are completed accurately and 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	BSBMED303B Maintain patient records	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

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Assessment Requirements for BSBMED303 Maintain patient records

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:

- use record and file management systems to create, access, store and maintain accurate records, according to organisational requirements
- identify and recommend improvements to recordkeeping system or own work practices
- communicate with relevant people about patient data.

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 patient recordkeeping
- explain workplace policies and procedures related to patient recordkeeping, including privacy and confidentiality
- describe filing 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:

- a records system
- documented procedures
- case studies and, where possible, real situations
- office equipment and resources.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• Recognises text within job specifications and work processes relating to maintaining stock levels and other job-related outcomes

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Writing	2.2, 2.4, 2.5, 4.1, 4.2, 5.2	• 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	• Listens closely to directions and asks questions to clarify understanding
Numeracy	2.1-2.5, 3.5, 4.1-4.3, 5.2	• 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	• 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	• 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	• 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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• Recognises familiar text types within job specifications and regulatory requirements and uses different strategies to identify relevant information
Writing	1.2, 3.2	• Produces records and labels according to workplace requirements
Oral	1.1, 1.3, 1.4, 1.5,	• Uses appropriate language and non-verbal features to provide information

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Communication	1.7, 2.4	• 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	• 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	• 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	• 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

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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.

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Links

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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• Creates and maintains records using required words and codes • Prepares documentations for others using words and

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		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	• 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	• 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	• 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	• 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

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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

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- 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

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BSBMGT401 Show leadership in the workplace

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 teams and individuals by modelling high standards of conduct to reflect the organisation's standards and values.

It 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 managers 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

Management and Leadership – Management

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. Model high standards of management performance and behaviour	1.1 Ensure management performance and behaviour meets the organisation’s requirements 1.2 Ensure management performance and behaviour serves as a positive role model for others 1.3 Develop and implement performance plans in accordance with organisation’s goals and objectives 1.4 Establish and use key performance indicators to meet

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ELEMENT	PERFORMANCE CRITERIA
	organisation's goals and objectives
2. Enhance organisation's image	2.1 Use organisation's standards and values in conducting business 2.2 Question, through established communication channels, standards and values considered to be damaging to the organisation 2.3 Ensure personal performance contributes to developing an organisation which has integrity and credibility
3. Make informed decisions	3.1 Gather and organise information relevant to the issue/s under consideration 3.2 Facilitate individual's and team's active participation in decision-making processes 3.3 Examine options and assess associated risks to determine preferred course/s of action 3.4 Ensure decisions are timely and communicate them clearly to individuals and teams 3.5 Prepare plans to implement decisions and ensure they are agreed by relevant individuals and teams 3.6 Use feedback processes effectively to monitor the implementation and impact of decisions

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, 3.1, 3.3, 3.5, 3.6	• Gathers, interprets and analyses text relating to organisational goals, standards and values to aid planning and decision making
Writing	1.3, 1.4, 3.1, 3.3, 3.5, 3.6	• Records and reports key information related to the organisational goals, standards and objectives • Researches, plans and prepares documentation for relevant stakeholders
Oral Communication	1.2, 1.3, 2.2, 2.3, 3.2, 3.4, 3.5, 3.6	• Uses appropriate structure and language when developing performance plans, or when seeking and providing information about organisational goals and

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		objectives
Numeracy	1.4	• Identifies and comprehends mathematical information in familiar texts to establish key performance indicators
Navigate the world of work	1.1, 1.2, 1.3, 1.4, 2.1, 2.3	• Understands 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
Interact with others	1.2, 1.3, 2.2, 2.3, 3.2, 3.4, 3.5, 3.6	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective outcomes • Recognises the 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, 1.3, 1.4, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6	• Develops plans 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, gathering relevant information and identifying and evaluating options against agreed criteria • Evaluates effectiveness of decisions in terms of how well they meet stated goals

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.

Organisation's standards and values must be identified by considering:	• explicitly stated values • values that are implied by the way the organisation conducts its business.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMGT401 Show leadership in the workplace	BSBMGT401A Show leadership in the workplace	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

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Assessment Requirements for BSBMGT401 Show leadership in the workplace

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 the organisation's standards and values, whether stated or implied by the way the organisation conducts its business
- evaluate own behaviour and performance against these and adjust to achieve required standards
- develop and implement performance plans and key performance indicators (KPIs) to meet organisation's goals and objectives
- use established communication channels to raise questions about standards and values that may be damaging to the organisation
- 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 feedback on the implementation and impact of 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:

- explain how to identify an organisation's standards and values when they are:
  - stated

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  - implied
- articulate organisational values and expectations of behaviour
- explain basic theory of group behaviour
- outline the organisation's process for raising questions about standards and values
- give examples of behaviours and performance that would typically be considered damaging to an organisation
- explain concepts including:
  - organisational values
  - role modelling
  - integrity and credibility
  - leadership.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBMGT402 Implement operational plan

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 the operational plan by monitoring and adjusting operational performance, planning and acquiring resources and providing reports on performance as required.

It applies to individuals who plan activities to achieve the measurable, stated objectives of the team and the organisation. 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

Management and Leadership – Management

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. Implement operational plan	1.1 Collate, analyse and organise details of resource requirements in consultation with relevant personnel, colleagues and specialist resource managers 1.2 Implement operational plans to contribute to the achievement of organisation's performance/business plan 1.3 Identify and use key performance indicators (KPIs) to monitor

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ELEMENT	PERFORMANCE CRITERIA
	operational performance 1.4 Manage contingencies by adjusting the implementation of the operational plan in consultation with others 1.5 Provide assistance in the development and presentation of proposals for resource requirements in line with operational planning processes
2. Implement resource acquisition	2.1 Recruit and induct employees within organisation's policies, practices and procedures 2.2 Implement plans for acquisition of physical resources and services within organisation's policies, practices and procedures and in consultation with relevant personnel
3. Monitor operational performance	3.1 Monitor performance systems and processes to assess progress in achieving profit/productivity plans and targets 3.2 Analyse and use budget and actual financial information to monitor profit/productivity performance 3.3 Identify unsatisfactory performance and take prompt action to rectify the situation according to organisational policies 3.4 Provide mentoring, coaching and supervision to support individuals and teams to use resources effectively, economically and safely 3.5 Present recommendations for variation to operational plans to the designated persons/groups and gain approval 3.6 Implement systems, procedures and records associated with performance in accordance with organisation's requirements

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	3.4	• Actively reinforces learning by applying new knowledge and skills in mentoring, coaching and supervising others
Reading	1.1-1.5, 2.1, 2.2, 3.1, 3.2, 3.6	• Identifies, interprets, analyses and reviews textual information related to the operational plan and

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		monitoring of operational performance
Writing	1.1-1.5, 2.1, 2.2, 3.2-3.6	• 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	1.1, 1.4, 1.5, 2.1, 2.2, 3.3, 3.4, 3.5	• Participates in a variety of spoken exchanges with a range of audiences varying structure and language to suit the audience
Numeracy	1.1, 1.2, 1.3, 1.4, 1.5, 2.2, 3.1, 3.2, 3.3	• 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
Navigate the world of work	1.5, 2.1, 2.2, 3.3, 3.4, 3.6	• Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.1, 1.4, 1.5, 2.1, 2.2, 3.3, 3.4, 3.5	• 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
Get the work done	1.1, 1.2, 1.3, 1.4, 1.5, 2.2, 3.1, 3.2, 3.3, 3.6	• Takes responsibility for planning, organising, implementing and monitoring tasks required to achieve required outcomes • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying and evaluating options against agreed criteria • Evaluates effectiveness of decisions in terms of how well they met stated goals • Recognises and addresses an increasing range of familiar problems by implementing contingency plans

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT402 Implement	BSBMGT402A Implement	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
operational plan	operational plan	Training Packages. Edits to clarify intent of Performance Criteria.	

Links

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

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Assessment Requirements for BSBMGT402 Implement operational plan

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:

- interact with a range of people/groups to identify resource requirements, performance objectives, systems, procedures and records relating to the operational plan
- vary the operational plan and gain approval to deal with contingencies
- monitor operational performance against the performance objectives and budgets and take action to rectify unsatisfactory performance
- plan and acquire physical and human resources using organisation's systems and procedures
- manage and support personnel to achieve performance objectives. including inducting new employees and providing mentoring and coaching
- present information and recommendations to support implementation and variation of the operational plan
- document and provide reports on performance as required by 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:

- describe performance monitoring systems and processes
- describe methods for problem solving
- explain how organisational policies and procedures relate to the operational plan.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- organisational operational plans, policies and procedures
- workplace documentation and resources including budgets, physical and human resource procurement documentation, employee induction and performance monitoring 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

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BSBMGT403 Implement continuous improvement

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 the organisation's continuous improvement systems and processes. It covers using systems and strategies to actively encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements.

It applies to managers who have an active role in implementing the continuous improvement process to achieve the organisation's objectives. Their position is closely associated with the creation and delivery of products and services which means that they have an important role in influencing the ongoing development of the organisation.

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

Management and Leadership – Management

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. Implement continuous improvement systems and	1.1 Implement systems to ensure that individuals and teams are actively encouraged and supported to participate in decision

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ELEMENT	PERFORMANCE CRITERIA
processes	making processes, assume responsibility and exercise initiative 1.2 Communicate the organisation's continuous improvement processes to individuals and teams, and obtain feedback 1.3 Ensure effective mentoring and coaching allows individuals and teams to implement the organisation's continuous improvement processes
2. Monitor and review performance	2.1 Use the organisation's systems and technology to monitor and review progress and to identify ways in which planning and operations could be improved 2.2 Improve customer service through continuous improvement techniques and processes 2.3 Formulate and communicate recommendations for adjustments to those who have a role in their development and implementation
3. Provide opportunities for further improvement	3.1 Implement processes to ensure that team members are informed of savings and productivity/service improvements in achieving the business plan 3.2 Document work performance to aid the identification of further opportunities for improvement 3.3 Manage records, reports and recommendations for improvement 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.2, 3.3	• Evaluates and integrates facts and ideas to construct meaning from a range of text types in an effort to implement continuous improvement systems and processes
Writing	1.1, 1.2, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	• Selects vocabulary, grammatical structures and conventions appropriate to text • Researches, plans and prepares continuous improvement documentation for relevant stakeholders
Oral	1.2, 1.3, 2.3	• Participates in a variety of spoken exchanges with a range of audiences using structure and language to suit

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Communication		the audience
Navigate the world of work	2.1	• Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment
Interact the work of others	1.2, 1.3, 2.3, 3.1	• Selects and uses appropriate conventions and protocols when communicating with diverse individuals to seek or 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
Get the work done	1.1, 1.3, 2.1, 2.2, 3.1, 3.2, 3.3	• Takes responsibility for planning and organising own workload to achieve required outcomes • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying and evaluating options against agreed criteria • Evaluates effectiveness of decisions in terms of how well they meet stated goals • Uses digital applications to access and filter data, extract, organise, integrate and share relevant information • Recognises the potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT403 Implement continuous improvement	BSBMGT403A Implement continuous improvement	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

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Assessment Requirements for BSBMGT403 Implement continuous improvement

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:

- implement continuous improvement systems and provide mentoring and coaching support to enable individuals and teams to participate in decisions, take responsibility, show initiative and implement improvement processes
- implement processes to inform team members about savings and productivity/service improvements achievements
- communicate effectively to support the continuous improvement system and implementation of improvements
- apply continuous improvement to customer services including internal and external customers
- implement, monitor and adjust improvement plans, processes and procedures to improve performance
- document performance to identify further opportunities for improvement
- manage records and reports within the organisation's systems and procedures.

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 continuous improvement processes
- list typical areas of need for coaching and mentoring to support continuous improvement
- explain how change management techniques can support continuous improvement and initiative
- identify the organisation's systems and data that can be used for benchmarking and monitoring performance for continuous improvement.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBMGT404 Lead and facilitate off-site 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 supervise staff who perform agreed duties at an alternative site (usually home) during some or all of the scheduled work hours. Off-site work is a flexible employment option that meets all legal and regulatory employment requirements.

It applies to individuals who may be supervisors or team leaders and have responsibility for overseeing the work of off-site staff.

Increasingly, managers and staff are at different locations and the opportunities for face to face communication are reduced. In these cases, individuals must develop different techniques and approaches to ensure quality standards and work outcomes are met.

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

Unit Sector

Management and Leadership – Management

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. Facilitate off-site work outcomes	1.1 Clarify roles and responsibilities of off-site work supervisors with management and off-site staff 1.2 Provide leadership and direction to off-site staff to foster

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ELEMENT	PERFORMANCE CRITERIA
	independent self managed work practices that address agreed outcomes in terms of quality and milestones 1.3 Ensure that work objectives for off-site staff are linked to measurable targets and include agreed timeframes 1.4 Use participative, transparent decision making to review work allocation responsibilities of off-site staff and related on-site staff
2. Support off-site staff	2.1 Provide guidance to off-site staff to establish and maintain a supportive working environment in accordance with legal and organisational requirements 2.2 Assign key personnel/mentors to support off-site staff and to provide a link between off-site staff and the organisation 2.3 Establish and maintain effective working relations between on-site staff and off-site staff through regular meetings and other occasions used to build organisational culture and values
3. Manage off-site staff performance	3.1 Plan and conduct regular meetings to determine individual progress, identify needs, clarify and solve issues, and provide networking opportunities 3.2 Evaluate performance against agreed goals and targets and address in accordance with organisational policy and practice 3.3 Address problems in work performance through constructive solutions identified with off-site staff 3.4 Ensure evidence relating to performance is valid, documented and evaluated to identify learning and development requirements

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, 2.1, 3.2, 3.4	• Uses various strategies to identify and interpret relevant information within job specifications and processes
Writing	1.1, 1.2, 1.3, 3.2, 3.4	• Researches, plans and prepares documentation related to performance management outcomes using grammatical structures and conventions appropriate to the task

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Oral Communication	1.1, 1.2, 1.4, 2.1, 2.3, 3.1, 3.3	• Uses listening and questioning skills to discuss and seek opinion about roles and responsibilities • Presents information to a range of audiences using structure and language to suit audience
Numeracy	1.2, 1.3	• Selects and interprets mathematical information that is partly embedded in a range tasks to determine timelines and milestones
Navigate the world of work	2.1	• Adheres to organisational policies, procedures and legislative requirements
Interact with others	1.1, 1.2, 2.1, 2.3, 3.3	• Establishes and uses appropriate communication conventions and protocols to facilitate effective communication between staff • 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 • Recognises the importance of building rapport to establish effective working relationships • Recognises the importance of taking audience, purpose and contextual factors into account when deciding what to communicate, with whom, and how
Get the work done	1.1, 1.3, 1.4, 2.2, 3.1, 3.2, 3.3, 3.4	• Takes responsibility for planning and organising own workload and work tasks of others • Uses systematic, analytical processes to evaluate performance or solve problems • Uses a range of digitally based technology and applications to access and filter data, extract, organise, integrate and share relevant information • Recognises the potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT404 Lead and facilitate off-site staff	BSBMGT404A Lead and facilitate off-site staff	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMGT404 Lead and facilitate off-site 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:

- implement strategies to facilitate work and provide guidance, supervision and support for off-site staff to meet agreed work outcomes
- facilitate communications with off-site staff, supervisors, managers and other relevant personnel to clarify roles and responsibilities, agree on work outcomes, maintain work relationships and manage performance
- apply feedback and performance management methods for off-site 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:

- give examples of off-site work that are typical in the organisation or industry
- explain challenges that are likely to arise with off-site work and strategies to address them
- outline legal and ethical requirements and organisational policies and procedures that apply to off-site work.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBMGT405 Provide personal leadership

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 display high levels of personal leadership and be a role model within the work environment.

It applies to individuals who have a leadership role and how they conduct themselves, the initiative they take in influencing, assisting and guiding others, and the way they manage their own role and responsibilities.

Competence in this unit requires consistently high levels of self-management and behaviours that exemplify the desired standards within the organisation. The individual must earn the trust and respect of the team and act as a role model at all times.

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

Unit Sector

Management and Leadership – Management

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. Influence individuals and teams in a positive manner	1.1 Encourage, value and reward individual and team efforts and contributions 1.2 Promote accountability of work undertaken by individuals/teams by communicating roles, responsibilities and

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ELEMENT	PERFORMANCE CRITERIA
	expectations clearly 1.3 Gain positive acceptance and support for information and ideas from the team
2. Make informed decisions	2.1 Gather and organise information relevant to issue/s under consideration 2.2 Invite individuals/teams to actively participate in decision-making processes 2.3 Determine preferred course of action after risks and options are examined and assessed 2.4 Communicate decisions to individuals/teams clearly and in a timely manner 2.5 Prepare plans to implement decisions after agreement with relevant individuals/team 2.6 Monitor implementation and impact of decision using reliable feedback processes
3. Enhance image of the enterprise	3.1 Conduct business consistent with enterprise standards and values 3.2 Note and promptly discuss with appropriate persons, any inappropriate values and standards exhibited within the organisation, using established communication channels 3.3 Consistently display a very high standard of personal presentation in line with organisational expectations and policies
4. Demonstrate high standards of personal and management performance	4.1 Contribute to developing a reputable organisation which has integrity and credibility, through personal performance and own behaviour 4.2 Ensure standards of personal and management performance are consistent with enterprise requirements 4.3 Provide a positive role model for others through personal and managerial performance 4.4 Develop and implement plans in accordance with enterprise goals and objectives 4.5 Develop, set and monitor key performance indicators and targets within team/enterprise business plans

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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, 2.5, 2.6, 4.4, 4.5	• Gathers, interprets and analyses text within job specifications and processes to make informed decisions and provide personal leadership
Writing	1.2, 2.1, 2.3-2.5, 3.2, 4.4, 4.5	• Prepares, plans and develops documentation for team members and other relevant stakeholders to communicate and articulate information and ideas clearly and effectively
Oral Communication	1.1-1.3, 2.2, 2.4, 3.2, 4.1, 4.3	• Participates in spoken exchanges with a range of audiences varying language and features to suit the audience
Navigate the world of work	3.1, 3.3, 4.1-4.4	• Understands how own role meshes with others and contributes to broader work goals • Adheres to organisational policies and procedures
Interact with others	1.1-1.3, 2.2, 2.4, 2.6, 3.2, 4.1, 4.3	• Selects and uses appropriate conventions and protocols when communicating with a range of personnel to seek or share information • 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 • Demonstrates an increasing awareness of the interplay of factors involved in any group interaction
Get the work done	2.1-2.3, 2.5, 2.6, 4.4, 4.5	• 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 • Uses personal experience and feedback to reflect on how variables impact decision outcomes and to gain insights into what constitutes ‘good’ judgement and an effective decision in different contexts

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMGT405 Provide personal leadership	BSBMGT405A Provide personal leadership	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

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Assessment Requirements for BSBMGT405 Provide personal leadership

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:

- acquire and use information to best advantage for achievement of team/project performance goals
- make decisions appropriate to achievement of team performance goals
- effectively manage work to achieve goals and results
- introduce and monitor practices to improve performance
- undertake effective consultation processes
- effectively use management information systems in achievement of team performance goals and objectives
- promote available learning methods to support team competence
- clearly and effectively communicate critical information to team, peers and 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:

- list relevant coaching and mentoring techniques
- identify continuous improvement techniques and processes
- describe enterprise culture and values
- identify the enterprise mission, business goals and standards
- list relevant enterprise policies, procedures and guidelines
- identify relevant performance management policies, procedures and systems.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBMGT406 Plan and monitor continuous improvement

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 monitor the organisation's continuous improvement systems and processes.

It applies to individuals who use various systems and strategies to actively encourage a team to monitor and review performance, identifying opportunities for improvements.

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

Unit Sector

Management and Leadership – Management

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. Plan continuous improvement systems and processes	1.1 Plan systems according to organisational policy to ensure individuals and teams are actively encouraged and supported to participate in decision-making processes, assume responsibility and exercise initiative 1.2 Communicate the organisation's continuous improvement processes to individuals and teams, and obtain feedback 1.3 Ensure effective mentoring and coaching allow individuals and teams to implement the organisation's continuous improvement processes

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Support efforts to enhance sustainable and environmentally-friendly work practices in accordance with the organisation's continuous improvement processes
2. Monitor and review performance	2.1 Use the organisation's systems and technology according to agreed operational processes to monitor and review progress and to identify ways planning and operations could be improved 2.2 Improve customer service through continuous improvement techniques and processes according to requirements of the organisation's continuous improvement systems and processes 2.3 Formulate and communicate recommendations for adjustments to those who have a role in their development and implementation
3. Provide opportunities for further improvement	3.1 Implement processes to ensure team members are informed of savings and productivity or service improvements in line with requirements of the business plan 3.2 Record work performance to assist in identifying further opportunities for improvement following agreed organisational recordkeeping processes 3.3 Manage records, reports and recommendations for improvement 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.2, 3.1-3.3	• Selects and applies a range of reading strategies as appropriate to plan and monitor continuous improvement processes
Writing	1.1, 1.2, 2.1, 2.3, 3.1-3.3	• Plans, monitors and communicates relationships relating to continuous improvement process, matching style of writing to purpose and audience
Oral Communication	1.1-1.3, 2.3, 3.1	• Selects and uses appropriate strategies to establish and maintain spoken communication to gain commitment of individuals and teams to continuously improve
Navigate the world of work	1.1, 1.4, 2.1, 2.2, 3.1, 3.2	• Adheres to organisational policies, procedures and business plans and considers own role for its

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		contribution to broader goals of the work environment
Interact with others	1.1-1.3, 2.3, 3.1	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role • Demonstrates an increasing awareness of the interplay of factors involved in any group interaction • 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, 1.3, 2.1, 2.2, 3.1, 3.3	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify and plan ongoing improvements within the organisation • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying and evaluating options against agreed criteria • Selects or supports new ideas based on their contribution to achievement of broader goals • Uses digital systems and tools to achieve work goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT406 Plan and monitor continuous improvement	BSBMGT406A Plan and monitor continuous improvement	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

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Assessment Requirements for BSBMGT406 Plan and monitor continuous improvement

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:

- implement, monitor and adjust plans, processes and procedures to improve performance
- demonstrate ways to support others to implement continuous improvement systems and processes
- identify and report opportunities for further improvement.

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 relevant principles and techniques associated with:
  - benchmarking
  - best practice
  - change management
  - continuous improvement systems and processes
  - quality systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBMGT407 Apply digital solutions to work processes

Modification History

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

Application

This unit defines the skills, knowledge and outcomes to integrate digital technologies into common management practice.

It applies to supervisors, team, 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

Management and Leadership - Management

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. Utilise digital workplace information	1.1 Identify available workplace digital applications for communications, technologies and networks 1.2 Locate and use digital information as an integral part of workplace operations 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

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ELEMENT	PERFORMANCE CRITERIA
2. Lead work processes in a digital environment	2.1 Select, integrate and use digital services in workplace operations 2.2 Review and select digital solutions that are fit for purpose 2.3 Integrate new digital innovations into workplace operations 2.4 Identify and adopt digital media protocols and conventions 2.5 Train, encourage and support team members in the application of digital solutions
3. Recognise and apply intellectual property requirements	3.1 Identify legislation, regulations and the organisation's policy relevant to intellectual property 3.2 Review digital process and applications for compliance with intellectual property requirements 3.3 Document, register and report 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	Performance Criteria	Description
Reading	1.1, 1.3	• Sources, analyses and interprets textual information, including technical data, in the context of organisational strategy and compliance requirements
Writing	3.3	• 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	2.5	• Presents information using language and features appropriate to the audience
Navigate the world of work	2.4, 3.1-3.3	• Monitors adherence to organisational policies and legal requirements
Interact with others	2.5	• Uses a collaborative instructional approach to encourage, support and develop understanding and skills in others
Get the work	1.2, 1.4, 1.5, 2.1- 2.4	• Uses and investigates new digital technologies and

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done		applications to support organisational plans • Supports the implementation and review of digital technologies

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT407 Apply digital solutions to work processes	Not applicable	New unit	No equivalent qualification

Links

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

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Assessment Requirements for BSBMGT407 Apply digital solutions to work processes

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 digital applications, services and information and evaluate them for use in the workplace including:
  - 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 and/or mentoring or other support for team 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:

- explain how legislation, regulations and the organisation's policies and procedures relate to working with digital technology and information
- explain key elements to consider when evaluating whether digital technology and information options are fit for purpose
- outline the intellectual property risks to the organisation in relation to digital technology.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- office equipment and technology
- relevant workplace documentation and resources
- 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

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BSBMGT502 Manage people performance

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 the performance of staff who report to them directly. Development of key result areas and key performance indicators and standards, coupled with regular and timely coaching and feedback, provide the basis for performance management.

It applies to individuals who manage people. It covers work allocation and the methods to review performance, reward excellence and provide feedback where there is a need for improvement.

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

Management and Leadership – Management

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. Allocate work	1.1 Consult relevant groups and individuals on work to be allocated and resources available

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Develop work plans in accordance with operational plans 1.3 Allocate work in a way that is efficient, cost effective and outcome focussed 1.4 Confirm performance standards, Code of Conduct and work outputs with relevant teams and individuals 1.5 Develop and agree performance indicators with relevant staff prior to commencement of work 1.6 Conduct risk analysis in accordance with the organisational risk management plan and legal requirements
2. Assess performance	2.1 Design performance management and review processes to ensure consistency with organisational objectives and policies 2.2 Train participants in the performance management and review process 2.3 Conduct performance management in accordance with organisational protocols and time lines 2.4 Monitor and evaluate performance on a continuous basis
3. Provide feedback	3.1 Provide informal feedback to staff on a regular basis 3.2 Advise relevant people where there is poor performance and take necessary actions 3.3 Provide on-the-job coaching when necessary to improve performance and to confirm excellence in performance 3.4 Document performance in accordance with the organisational performance management system 3.5 Conduct formal structured feedback sessions as necessary and in accordance with organisational policy
4. Manage follow up	4.1 Write and agree on performance improvement and development plans in accordance with organisational policies 4.2 Seek assistance from human resources specialists, where appropriate 4.3 Reinforce excellence in performance through recognition and continuous feedback 4.4 Monitor and coach individuals with poor performance 4.5 Provide support services where necessary 4.6 Counsel individuals who continue to perform below expectations and implement the disciplinary process if necessary 4.7 Terminate staff in accordance with legal and organisational

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ELEMENT	PERFORMANCE CRITERIA
	requirements where serious misconduct occurs or ongoing poor-performance continues

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	2.2, 3.3, 4.4	• Consolidates and improves own knowledge and skills by coaching, mentoring or training others
Reading	1.2, 1.6, 2.4	• Gathers, interprets and analyses texts in organisational documents to facilitate performance management
Writing	1.2, 1.4, 1.5, 1.6, 2.1, 2.3, 2.4, 3.4, 3.5, 4.1, 4.7	• Plans and prepares documents for allocating work and managing performance suitable for the target audience and in accordance with organisational requirements
Oral Communication	1.1, 1.4, 1.5, 2.2, 2.3, 3.1, 3.2, 3.3, 3.5, 4.2-4.7	• Uses language and structure appropriate to context and audience to explain expected standards of performance, provide feedback and coach staff
Numeracy	1.3, 1.4, 1.5, 1.6, 2.1, 2.4, 3.4, 4.1	• Extracts and evaluates mathematical information embedded in a range of tasks and text relating to performance standards and risk analysis
Navigate the world of work	1.2, 1.6, 2.1, 2.3, 3.4, 3.5, 4.1, 4.7	• Appreciates the implications of legal and regulatory responsibilities related to own work and the organisation as a whole • Monitors adherence to organisational policies and procedures
Interact with others	1.1, 1.3, 1.4, 1.5, 2.2, 3.1, 3.2, 3.3, 4.2-4.6	• Recognises and 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
Get the work done	1.2, 1.3, 1.5, 1.6, 2.1, 2.4, 4.1, 4.2	• 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

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		variables impact on performance

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT502 Manage people performance	BSBMGT502B Manage people performance	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

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Assessment Requirements for BSBMGT502 Manage people performance

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:

- consult with relevant 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
- monitor, evaluate and provide feedback on performance and provide coaching or training, as needed
- reinforce excellence in performance through recognition and continuous feedback
- seek assistance from human resources specialists where appropriate
- keep records and documentation in accordance with the organisational performance management 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 legislative and regulatory requirements
- outline relevant awards and certified agreements
- explain performance measurement systems utilised within the organisation
- explain unlawful dismissal rules and due process
- describe staff development options and information.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation
- workplace documentation and resources
- 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

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BSBMGT516 Facilitate continuous improvement

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 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.

It 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

Management and leadership – Management

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. Lead continuous improvement systems and processes	1.1 Develop strategies to ensure that team members are actively encouraged and supported to participate in decision-making processes, assume responsibility and exercise initiative as

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ELEMENT	PERFORMANCE CRITERIA
	appropriate 1.2 Establish systems to ensure that the organisation's continuous improvement processes are communicated to stakeholders 1.3 Ensure that change and improvement processes meet sustainability requirements 1.4 Develop effective mentoring and coaching processes to ensure that individuals and teams are able to implement and support the organisation's continuous improvement processes 1.5 Ensure that insights and experiences from business activities are captured and accessible through knowledge management systems
2. Monitor and adjust performance strategies	2.1 Develop strategies to ensure that systems and processes are used to monitor operational progress and to identify ways in which planning and operations could be improved 2.2 Adjust and communicate strategies to stakeholders according to organisational procedures
3. Manage opportunities for further improvement	3.1 Establish processes to ensure that team members are informed of outcomes of continuous improvement efforts 3.2 Ensure processes include recording of work team performance to assist in identifying further opportunities for improvement 3.3 Consider areas identified for further improvement when undertaking future planning

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, 1.4, 1.5, 2.1, 2.2, 3.3	• Identifies and extracts relevant information from a range of complex texts • Locates, interprets and analyses workplace documentation to gather information relating to continuous improvement
Writing	1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 3.1-3.3	• Develops complex texts related to continuous improvement processes according to organisational requirements

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		• Ensures the vocabulary, grammatical structures and conventions are appropriate for the context and target audience
Oral Communication	1.1, 1.2, 1.4, 2.2	• Presents information to a range of audiences using appropriate structure and language • Listens and comprehends information from a variety of spoken exchanges with clients, co-workers and other stakeholders • Confirms understanding through questioning and active listening
Navigate the world of work	1.1-1.3, 2.1, 2.2	• Develops strategies to enable compliance with legislative requirements and achievement of the organisation's goals • Monitors adherence to organisational policies, procedures and protocols and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.1, 1.2, 1.4, 2.2	• Identifies and uses appropriate conventions and protocols when communicating with colleagues and external stakeholders • 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, 1.2, 1.4, 1.5, 2.1, 3.1, 3.2, 3.3	• Takes responsibility for developing, implementing and monitoring systems and processes to achieve organisational outcomes • Uses analytical and lateral thinking to review current practices and develop ideas for improvement • Reflects on the ways in which digital systems and tools are used, or could be used, to achieve work goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT516 Facilitate continuous improvement	BSBMGT516C Facilitate continuous improvement	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMGT516 Facilitate continuous improvement

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 systems and processes for continuous improvement that:

- facilitate effective contributions to and communications about continuous improvement processes and outcomes
- address sustainability requirements
- incorporate mentoring, coaching and other support to enable people to participate effectively in continuous improvement processes
- capture insights, experiences and ideas for improvements and incorporate them into the organisation's knowledge management systems and future planning.

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 how systems and procedures can support effective continuous improvement
- explain how continuous improvement systems and processes relate to other business systems and requirements including, knowledge management, quality, performance management and sustainability.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBMGT517 Manage operational plan

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 monitor implementation of the operational plan to provide efficient and effective workplace practices within the organisation's productivity and profitability plans.

Management at a strategic level requires systems and procedures to be developed and implemented to facilitate the organisation's operational plan.

This unit applies to individuals who manage the work of others and operate within the parameters of a broader strategic and/or business plan.

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

Unit Sector

Management and Leadership – Management

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. Develop operational plan	1.1 Research, analyse and document resource requirements and develop an operational plan in consultation with relevant personnel, colleagues and specialist resource managers 1.2 Develop and/or implement consultation processes as an

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ELEMENT	PERFORMANCE CRITERIA
	integral part of the operational planning process 1.3 Ensure the operational plan includes key performance indicators to measure organisational performance 1.4 Develop and implement contingency plans for the operational plan 1.5 Ensure the development and presentation of proposals for resource requirements is supported by a variety of information sources and seek specialist advice as required 1.6 Obtain approval for the plan from relevant parties and explain the plan to relevant work teams
2. Plan and manage resource acquisition	2.1 Develop and implement strategies to ensure that employees are recruited and/or inducted within the organisation's human resources management policies, practices and procedures 2.2 Develop and implement strategies to ensure that physical resources and services are acquired in accordance with the organisation's policies, practices and procedures 2.3 Recognise and incorporate requirements for intellectual property rights and responsibilities in recruitment and acquisition of resources and services
3. Monitor and review operational performance	3.1 Develop, monitor and review performance systems and processes to assess progress in achieving profit and productivity plans and targets 3.2 Analyse and interpret budget and actual financial information to monitor and review profit and productivity performance 3.3 Identify areas of under-performance, recommend solutions and take prompt action to rectify the situation 3.4 Plan and implement systems to ensure that mentoring and coaching are provided to support individuals and teams to effectively, economically and safely use resources 3.5 Negotiate recommendations for variations to operational plans and gain approval from designated persons/groups 3.6 Develop and implement systems to ensure that procedures and records associated with documenting performance are managed in accordance with organisational requirements

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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, 1.5, 2.1, 2.2, 3.1, 3.2, 3.3, 3.4, 3.6	• Identifies and extracts relevant information from a range of complex texts • Gathers, interprets and analyses workplace documentation to determine requirements for the operational plan
Writing	1.1-1.5, 2.1, 2.2, 3.1-3.6	• Develops and documents a range of detailed texts relating to the management of an operational plan according to organisational requirements • Ensures the vocabulary, grammatical structures and conventions are appropriate for the context and target audience
Oral Communication	1.1, 1.2, 1.5, 1.6, 3.4, 3.5	• 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 • Confirms understanding through questioning and active listening
Numeracy	1.1, 1.3, 1.4, 3.1-3.4	• Selects and uses mathematical problem-solving strategies to organise resource requirements, performance benchmarks and financial viability of the operational plan
Navigate the world of work	2.1, 2.2, 3.4, 3.6	• Monitors adherence to organisational policies, procedures and considers own role in terms of its contribution to broader goals of the work environment • Appreciates the implications of legal responsibilities with specific reference to health and safety
Interact with others	1.1, 1.2, 1.5, 1.6, 3.5	• Identifies and uses appropriate conventions and protocols when communicating with colleagues and external stakeholders • 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
Get the work done	1.1-1.5, 2.1, 2.2, 3.1, 3.3, 3.4, 3.6	• Takes responsibility for developing and implementing systems and processes to achieve organisational objectives, seeking advice, feedback and support as

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		required to assist in the development and planning phase • Sequences and schedules complex activities, monitors implementation, and manages relevant communication • Uses systematic analytical processes to aid decision making, identify potential problems and generate contingency plans or solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT517 Manage operational plan	BSBMGT515A Manage operational plan	Updated to meet Standards for Training Packages. Edits to clarify intent of Performance Criteria. Additional performance criterion and evidence for intellectual property.	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

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Assessment Requirements for BSBMGT517 Manage operational plan

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 implement an operational plan using a variety of information sources and consultation (including using specialist advice if required) which includes:
  - resource requirements
  - key performance indicators
  - monitoring processes
  - contingency plans
- communicate effectively with relevant stakeholders to explain the plan and supporting information, seek approvals, negotiate variations and engage work teams
- develop and implement strategies to achieve the operational plan within the organisation's policies, practices and procedures including:
  - recruiting, inducting and developing personnel
  - acquiring physical resources and services
  - protecting intellectual property
  - making variations to the plan
  - monitoring and documenting 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:

- describe models and methods for operational plans
- explain the role of an operational plan in achieving the organisation's objectives
- explain budgeting processes

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- list alternative approaches to developing key performance indicators to meet business objectives
- outline the legislative and regulatory context relevant to the operational plan of the organisation
- outline the organisation's policies, practices and procedures that directly relate to the operational plan.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- workplace documentation and resources
- 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

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BSBMGT518 Develop organisation policy

Modification History

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

Application

This unit covers the development or review of 'in house' 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.

It 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, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Management and Leadership – Management

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. Anticipate and confirm the need for policy development or review	1.1 Identify internal and external factors, issues, events, directions or board/executive policies likely to cause changes to organisation policy 1.2 Consult with stakeholders about the likely implications and impact of these factors 1.3 Conduct a critical analysis of the need for new or revised

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ELEMENT	PERFORMANCE CRITERIA
	policy against the internal/external environment and existing policies 1.4 Recommend priority areas for policy development in accordance with organisational procedures
2. Plan the policy development process	2.1 Identify and analyse risks of the issues likely to impact on the policy development process 2.2 Outline policy requirements in a policy development plan in accordance with organisational procedures
3. Gather and analyse information for policy development	3.1 Identify and engage a representative group of stakeholders in a policy network 3.2 Source, analyse and apply information required to support the policy development process 3.3 Determine and apply an analytical framework for the development of the policy
4. Determine policy direction	4.1 Develop and communicate a range of policy options and assessment criteria to enable effective evaluation 4.2 Promote specific policy options where appropriate 4.3 Recommend preferred policy option and risk treatments in accordance with the policy development plan 4.4 Obtain approvals/endorsements in accordance with the policy development plan and organisational procedures
5. Draft policy	5.1 Draft policy within an iterative process of consultation, feedback, identification of changes and re-drafting 5.2 Implement risk management processes to ensure progress against the timeframe and milestones 5.3 Include an implementation plan in the policy that details responsibilities for implementation and strategies for transition, change management, initial and ongoing training and maintenance of the policy 5.4 Include mechanisms for monitoring compliance with the policy, quality assurance and evaluation of the policy 5.5 Ensure the organisation's style and format requirements are adhered to
6. Release and promote policy	6.1 Facilitate agreement to policy via organisational channels and critical stakeholders 6.2 Fully inform all stakeholders, particularly those who will be

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ELEMENT	PERFORMANCE CRITERIA
	responsible for implementing the new or revised policy 6.3 Manage fallout from dissenting stakeholders in accordance with the policy development plan 6.4 Release and promote the policy in accordance with 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	Performance Criteria	Description
Reading	1.1, 3.2	• Analyses and interprets textual information from a range of sources to inform policy review and development
Writing	1.4, 2.3, 4.1-4.3, 5.1, 5.3, 5.4, 6.4	• Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information in accordance with compliance and organisational requirements • Prepares written reports and workplace documentation that communicates strategy and intent clearly and effectively and elicits feedback
Oral Communication	1.2, 4.1, 6.2	• Uses specialised vocabulary to discuss and confirm policy development requirements adjusting words and features to suit audience and context
Navigate the world of work	1.4, 2.2, 4.4, 5.5, 6.3, 6.4	• Recognises, understands and applies organisational policies, procedures and protocols
Interact with others	1.2, 3.1, 4.1, 4.2, 6.1, 6.2, 6.3	• Adapts personal communication style to build positive working relationships and to show acknowledgement of the opinions of others
Get the work done	1.1, 1.3, 2.1, 3.2, 3.3, 4.2, 4.3, 5.2, 6.1	• Takes responsibility for planning and implementing tasks required to achieve organisational objectives, seeking advice, feedback and support as required to assist in the development, planning, review and implementation phases

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMGT518 Develop organisation policy	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

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Assessment Requirements for BSBMGT518 Develop organisation policy

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 within organisational procedures to:

- analyse internal and external factors and consult with stakeholders to identify needs for policy development or review and recommend priorities
- plan, develop and implement policy using:
  - an analytical framework
  - iterative and consultative processes with input from representative stakeholders
  - risk management
  - stakeholder and issues management strategies
  - quality assurance, monitoring and evaluation mechanisms.

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 policy development processes and practices
- explain the operation of policy cycles
- describe how to use analytical policy development frameworks
- identify the role of current policies underpinning the work area and how they relate to identified area for policy development or review
- outline the legislative and regulatory context relevant to the development of the organisation's policies.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- relevant workplace documentation and resources
- 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

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BSBMGT519 Incorporate digital solutions into plans and practices

Modification History

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

Application

This unit defines the skills, knowledge and outcomes required to implement digital solutions into organisational processes and practices. It covers identifying and evaluating opportunities, accessing technological expertise, and managing the changes associated with new technology.

It applies to leaders and managers where the application of digital solutions can improve workplace innovation and productivity.

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

Unit Sector

Management and Leadership - Management

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. Identify trends in digital applications	1.1 Review digital applications and developments and related regulatory requirements relevant to the work context and industry 1.2 Consult with technology experts to identify suitable applications 1.3 Undertake cost-benefit analysis to qualify suitability of new or improved digital applications

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Document risks, opportunities and barriers to implementation
2. Evaluate opportunities for new digital applications	2.1 Select and review processes, plans and practices to identify potential to integrate new digital solutions 2.2 Consult with others in the enterprise to identify flow on impacts 2.3 Work with technology specialists and others to identify proven intervention methods 2.4 Trial and evaluate proposed changes in line with enterprise risk policy and select options to progress
3. Implement digital solutions	3.1 Prepare new or revised procedure and process documentation 3.2 Prepare change plan and train personnel 3.3 Regularly monitor and adjust new applications as needed 3.4 Maintain data on new or revised practices
4. Evaluate solutions	4.1 Analyse implementation data to identify trends 4.2 Compare findings against expected benefits and productivity improvements 4.3 Document and recommend additional digital applications relevant to the workplace and industry

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, 4.1, 4.2	• Sources, analyses and interprets textual information, including technical data, in the context of organisational strategy and compliance requirements to make comparisons and identify trends
Writing	1.4, 3.1, 3.2, 4.3	• Develops texts dealing with complex concepts using specialised and detailed language to convey explicit information, requirements and recommendations in accordance with organisational requirements
Oral Communication	1.2, 2.2, 2.3, 3.2	• Presents information and seeks advice using language and features appropriate to audience

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Numeracy	1.3	• Selects and uses familiar mathematical techniques to calculate costs and to conduct cost benefit analyses
Navigate the world of work	1.1, 2.4, 3.1, 3.3	• Understands and adheres to legislative requirements and contributes to the development of organisational policy
Interact with others	1.2, 2.2, 2.3, 3.2	• Cooperates and consults with others to identify options to support strategy
Get the work done	1.1, 1.3, 2.1, 2.4, 3.1, 3.2, 3.3, 3.4, 4.1, 4.2, 4.3	• Plans and implements tasks required to implement digital solutions • Collects and analyses data to decide on effectiveness of practices and to determine risk • Actively identifies digital systems, devices and applications with potential to meet current and/or future needs

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT519 Incorporate digital solutions into plans and practices	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

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Assessment Requirements for BSBMGT519 Incorporate digital solutions into plans and practices

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:

- evaluate digital applications to determine costs, benefits, risks and suitability for the work context
- consult with technology subject matter experts on digital applications and implementation
- consult with stakeholders to plan for and implement changes
- manage implementation of the changes including:
  - trialling and evaluation of options
  - preparing a change plan
  - new or revised procedures and documentation
  - providing training
  - monitoring and making adjustments as needed
  - managing the flow on impacts of the changes
- monitor and evaluate new digital work practices against expected benefits and productivity 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:

- describe current trends and practices in digital applications relevant to the work context and industry
- outline the legislative and regulatory context of the organisation as it relates to digital solutions
- explain the convergence between information technology and telecommunications applications in the relevant industry

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- explain how other systems, policies and procedures in an organisation are likely to be affected by new digital applications
- outline typical challenges to implementing technology changes in an organisation and possible strategies to address them
- describe methods for evaluating success of digital applications.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- workplace documentation and resources
- 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

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BSBMGT520 Plan and manage the flexible workforce

Modification History

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

Application

This unit defines the skills and knowledge required to plan and manage the flexible workforce. It covers planning, recruitment and support for people in a range of work arrangements such as full and part time employees, casual labour, contractors, fixed term, virtual teams, distributed teams, offsite/home workers and volunteers.

It applies to leaders and managers who are responsible establishing and managing flexible workforce arrangements in any industry or community context.

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

Unit Sector

Management and Leadership – Management

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. Plan workforce requirements	1.1 Scope workforce requirements needed to achieve organisational goals 1.2 Specify workforce capability requirements 1.3 Identify mix of labour engagement options within industry and enterprise legislation, regulation and policy 1.4 Plan to resolve issues impacting on flexible workforce

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ELEMENT	PERFORMANCE CRITERIA
	covering social, industrial, training and performance
2. Engage flexible workforce	2.1 Implement flexible and innovative work arrangement to meet organisation's needs 2.2 Utilise flexible, real-time, virtual and other appropriate team structures to engage workforce 2.3 Facilitate the flexible team with suitable enabling technologies 2.4 Ensure rights, obligations and responsibilities of all parties are clear and understood 2.5 Monitor, review and adjust flexible workforce arrangement for ongoing suitability to work requirements
3. Support flexible workforce	3.1 Apply a consultative approach to address the needs of the flexible workforce 3.2 Provide coaching support as appropriate 3.3 Provide opportunities for flexible workforce to integrate with other aspects of the organisation 3.4 Use risk management methods to prevent discrimination against flexible workforce
4. Align flexible workforce arrangements to organisational requirements	4.1 Embed organisation's innovation and productivity systems and processes into flexible workforce arrangements 4.2 Implement processes to maintain corporate knowledge 4.3 Document and communicate rights and responsibilities regarding intellectual property 4.4 Implement strategies to engender the organisation's culture with the flexible workforce

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	• Sources, analyses and interprets textual information in the context of organisational strategy and compliance requirements to support workforce planning

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Writing	1.2, 4.3	• Researches, plans and prepares workplace documentation for relevant stakeholders using organisational formats
Oral Communication	3.1, 4.3	• Participates in discussions and communicates information using language and features appropriate to audience
Navigate the world of work	1.3, 2.4, 4.3	• Recognises, understands and applies legislation, industry standards, individuals' rights and organisational policies and procedures in the conduct of own work and in the context of organisational requirements
Interact with others	3.1, 4.3, 4.4	• Demonstrates high level commitment to and support for a positive workplace culture • Adapts personal communication style to build positive working relationships and to show respect for the opinions, values and particular needs of individuals
Get the work done	1.1, 1.4, 2.1, 2.2, 2.3, 2.5, 3.2, 3.3, 4.1, 4.2, 4.4	• Takes responsibility for planning effective strategies, sequencing and prioritising tasks and own workload to achieve efficient and effective outcomes • Reviews plans and evaluates outcomes to identify opportunities for improvement • Facilitates a climate in which creativity and innovation are accepted as an integral part of achieving outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT520 Plan and manage the flexible workforce	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

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Assessment Requirements for BSBMGT520 Plan and manage the flexible workforce

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 within requirements of relevant legislation, regulation and organisational policy to:

- plan and implement flexible workforce arrangements that support organisational culture, protect intellectual property and corporate knowledge and meet other business needs
- support the flexible workforce including:
  - enabling technologies
  - consultation to identify and address needs
  - strategies to support engagement of flexible workforce
  - coaching as appropriate
  - clear rights, roles and responsibilities
  - resolution of issues
  - prevention of discrimination
  - monitoring and making adjustments to arrangements as needed.

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 workplace planning methods
- explain how legislation, regulations and policy relate to flexible workforce arrangements
- outline typical challenges in implementing flexible workforce arrangements and possible strategies to address them
- explain how to support flexible workforce including techniques for:
  - resolving issues
  - identifying support needs

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- engaging workforce with other aspects of the organisation, its culture and goals.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulations
- workplace documentation, technology and resources
- 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

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BSBMGT521 Plan, implement and review a quality assurance program

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, implement and review a quality assurance program for an organisation's products, processes or services. It covers determining the organisation's quality assurance objectives and defining product quality standards based on the needs of the customer.

It applies to individuals in any sector or type of organisation who take an active role in managing people, procedures or processes to achieve an organisation’s quality 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

Management and Leadership - Management

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. Determine quality assurance objectives for the enterprise	1.1 Assess the future market requirements for quality assured products 1.2 Determine premiums for quality assurance

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Assess strategic benefits of quality assurance
2. Plan the quality assurance program and develop implementation strategies	2.1 Analyse information about customer needs to define product quality standards 2.2 Audit current status of products and operations 2.3 Evaluate and cost industry quality assurance options 2.4 Document required processes and practices in the quality assurance program manual 2.5 Prepare an implementation plan
3. Implement the quality assurance program	3.1 Document instructions to meet task and process requirements 3.2 Establish and implement contractor and staff training 3.3 Take account of people's social, cultural and ethnic backgrounds in communications 3.4 Introduce changes to processes and practices to support quality assurance 3.5 Establish processes to monitor and verify product quality 3.6 Introduce systems to record information and data on quality 3.7 Validate instructions under operating conditions 3.8 Analyse and resolve issues and problems
4. Review the quality assurance program	4.1 Establish reporting formats 4.2 Implement mechanisms for gaining feedback 4.3 Prepare for quality assurance audits

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	• Sources, analyses and interprets textual information and technical data required to plan, implement and review a strategic initiative
Writing	2.1, 2.4, 2.5, 3.1, 3.4, 4.1, 4.2	• Researches, plans and prepares proposals, reports, instructions and other supporting documentation for

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		relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions
Numeracy	2.3	• Selects and uses familiar mathematical techniques to determine costs associated with strategic decisions
Interact with others	3.3	• Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders
Get the work done	1.1-1.3, 2.1, 2.2, 2.3, 3.2, 3.4-3.8, 4.1-4.3	• Takes responsibility for planning effective strategies, sequencing and prioritising tasks to achieve required outcomes • Develops, implements and monitors plans and processes to ensure effectiveness of strategy and implementation • Applies problem solving processes, evaluates options and determines solutions

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.

A quality assurance program can focus on any combination of the organisation's:	• products • services • processes.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT521 Plan, implement and review a quality assurance program	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

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Assessment Requirements for BSBMGT521 Plan, implement and review a quality assurance program

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:

- determine quality assurance objectives for the organisation based on analysis of the market context and strategic benefits
- identify and analyse information to define quality standards for products, services or processes including:
  - feedback and/or other information reflecting customer needs
  - current status of products and operations
- plan for and implement the quality assurance program including:
  - evaluating options
  - communicating effectively about quality assurance with people from diverse social cultural and ethnic backgrounds
  - providing training to contractors and staff
  - introducing changes to existing processes and practices to support quality
  - establishing processes to monitor and verify quality
  - developing and validating manuals and instructions
  - establishing record systems and maintaining records
- review the quality assurance program.

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 influence of market projections and customer requirements on quality assurance objectives
- describe the influence of organisational culture and values on quality assurance objectives

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- outline the processes and sources of information used to identify market projections and customer requirements
- explain change management techniques that can support the implementation of the quality assurance program.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- workplace documentation and resources
- 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

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BSBMGT605 Provide leadership across the organisation

Modification History

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

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.

It applies to individuals who have a role in inspiring and motivating others to achieve organisational goals and to model professionalism in their organisation and industry. 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

Management and Leadership – Management

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. Communicate organisational mission and goals	1.1 Clarify objectives, values and standards in accordance with organisation's strategic direction 1.2 Establish linkages between organisational objectives, values and standards and the responsibilities of relevant groups and individuals 1.3 Ensure media and language used is appropriate to individuals and group circumstances

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ELEMENT	PERFORMANCE CRITERIA
	1.4 State clear expectations of internal groups and individuals and explain in a manner which builds commitment to the organisation 1.5 Address expectations of the organisation 1.6 Investigate incidents promptly and communicate results clearly to relevant groups and individuals
2. Influence groups and individuals	2.1 Build trust, confidence and respect of diverse groups and individuals through positive role modelling and effective communication and consultation 2.2 Embrace, resource and effectively implement improvements to organisational and workplace culture 2.3 Demonstrate understanding of the global environment and new technology in work activities 2.4 Ensure actions convey flexibility and adaptability to change and accessibility 2.5 Ensure consultation and participation in decision making occurs with relevant groups and individuals where appropriate 2.6 Ensure decision making takes into account needs and expectations of both internal and external groups 2.7 Ensure decision making occurs in accordance with risk management plans for all options, and within appropriate timeframes 2.8 Ensure that the organisation is represented positively in the media and community
3. Build and support teams	3.1 Assign accountabilities and responsibilities to teams consistent with their competencies and operational plans 3.2 Ensure teams are resourced to allow them to achieve their objectives 3.3 Empower teams and individuals through effective delegation and support for their initiatives 3.4 Create and maintain a positive work environment 3.5 Encourage teams and individuals to develop innovative approaches to the performance of work
4. Demonstrate personal and professional competence	4.1 Model ethical conduct in all areas of work and encourage others to adopt business ethics 4.2 Adapt appropriate interpersonal and leadership styles to meet particular circumstances and situations 4.3 Set and achieve personal objectives and work program

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ELEMENT	PERFORMANCE CRITERIA
	outcomes 4.4 Ensure self-performance and professional competence is continuously improved through engagement in a range of professional development activities 4.5 Participate regularly in industry/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	Performance Criteria	Description
Learning	4.3, 4.4, 4.5	• Actively looks for and accepts ways to maintain and improve own skills and knowledge
Reading	1.2, 1.3, 1.6, 2.7, 4.4, 4.5	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.1, 1.2, 1.3, 1.4, 1.6, 3.1, 4.3	• Records and reports key information related to the outcomes of the job to interact effectively and appropriately with the team • Researches, plans and prepares documentation using format and language appropriate to the audience
Oral Communication	1.1, 1.2, 1.4, 1.5, 1.6, 2.1, 2.5, 3.1, 3.3, 3.4, 3.5, 4.1, 4.2	• Participates in a variety of spoken exchanges with clients, co-workers and stakeholders using structure and language appropriate to context and audience
Navigate the world of work	1.1, 1.2, 1.5, 1.6, 2.8, 3.1, 4.1	• Works autonomously making high level decisions related to the achievement of organisational goals • Reflects on designation of roles and responsibilities and how everyone's role contributes to broader organisational goals • Appreciates the implications of ethical and other organisational responsibilities in carrying out own role
Interact with others	1.3, 1.4, 1.6, 2.1, 2.4, 3.1, 3.3, 3.4, 3.5, 4.1, 4.2	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals • Identifies strengths and limitations of own interpersonal skills and addresses areas that would benefit from further development

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		• Recognises the importance of building rapport in order to establish effective working relationships and inspire trust and confidence • Collaborates and cooperates with others, playing an active role in leading and facilitating effective group interaction and influencing direction • Facilitates a climate in which others feel comfortable to identify, explore and build on a variety of perspectives in order to achieve shared outcomes
Get the work done	1.1, 1.2, 1.6, 2.2-2.7, 3.1, 3.2, 3.5	• 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 • Applies problem solving processes to identify risks, evaluate options and determine solutions • Facilitates a climate in which creativity and innovation are accepted as an integral part of achieving outcomes • Actively identifies systems, devices and applications with potential to meet current and/or future needs

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT605 Provide leadership across the organisation	BSBMGT605B Provide leadership across 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

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Assessment Requirements for BSBMGT605 Provide leadership across the organisation

Modification History

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

Performance Evidence

Evidence of the ability to use interpersonal and risk management skills to:

- clearly communicate the organisation's objectives, values and standards to a range of stakeholders using appropriate media and language
- influence, support and provide resources for individuals and groups to:
  - participate in consultations and decision making processes
  - contribute to innovation and improvements
  - achieve their responsibilities and objectives
- facilitate consultative decision making processes with relevant internal and external stakeholders
- demonstrate ethical conduct and professional competence and continuing professional development
- encourage others to adopt business ethics and build their commitment to 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 business ethics and their application to leadership
- outline leadership styles and their application in supporting the organisation's mission, objectives and values
- explain the impact of legislation in providing leadership in the organisation
- explain the organisation's mission, purpose and values
- describe organisation objectives, plans and strategies
- explain organisational change processes.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulation, standards and codes
- relevant workplace documentation and resources
- 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

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BSBMGT608 Manage innovation and continuous improvement

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 sustain and develop an environment in which continuous improvement, innovation and learning are promoted and rewarded.

It applies to people 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

Management and Leadership – Management

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. Review programs, systems and processes	1.1 Establish strategies to monitor and evaluate performance and sustainability of key systems and processes 1.2 Undertake detailed analyses of supply chains, and operational, product and service delivery systems 1.3 Identify performance measures, and assessment tools and techniques, and evaluate their effectiveness 1.4 Analyse performance reports and variance from plans for key

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ELEMENT	PERFORMANCE CRITERIA
	result areas of the organisation 1.5 Identify and analyse changing trends and opportunities relevant to the organisation 1.6 Seek advice from specialists, where appropriate, to identify technology and electronic commerce opportunities
2. Develop options for continuous improvement	2.1 Brief groups on performance improvement strategies and innovation as an essential element of competition 2.2 Foster creative climate and organisational learning by promoting interaction within and between work groups 2.3 Encourage, test and recognise new ideas and entrepreneurial behaviour where successful 2.4 Accept failure of an idea during trialling and recognise, celebrate and embed success into systems 2.5 Undertake risk management and cost-benefit analysis for each option or idea approved for trial 2.6 Approve innovations through agreed organisational processes
3. Implement innovative processes	3.1 Promote continuous improvement and sustainability as essential to doing business 3.2 Address the impact of change and consequences for people and implement transition plans 3.3 Ensure objectives, timeframes, measures and communication plans are in place to manage implementation 3.4 Implement contingency plans in the event of non-performance 3.5 Follow up failure by prompt investigation and analysis of causes and manage emerging challenges and opportunities effectively 3.6 Ensure that learnings from activities are captured and managed to inform future work 3.7 Regularly evaluate continuous improvement systems and processes 3.8 Communicate costs and benefits of innovations and improvements to relevant groups and individuals

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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	3.6	• Plans and implements strategies to review and improve own performance
Reading	1.1-1.5, 2.5, 2.6, 3.2-3.5, 3.7	• Analyses, evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.1-1.5, 2.1, 2.5, 3.2, 3.3, 3.5, 3.6, 3.7, 3.8	• 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
Oral Communication	1.6, 2.1-2.4, 3.1, 3.5, 3.8	• Participates in a variety of spoken exchanges with co-workers and stakeholders when developing options and implementing the continuous improvement plan
Numeracy	1.1-1.5, 2.5, 3.3	• Selects and interprets mathematical information to analyse performance • Performs calculations required to establish timeframes, cost-benefits and measures for continuous improvement and innovation processes
Navigate the world of work	2.6	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	1.6, 2.1-2.4, 3.1, 3.5, 3.8	• Recognises the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how • 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
Get the work done	1.1, 1.2, 1.3, 1.5, 1.6, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3, 3.4, 3.5, 3.7	• Plans, organises, implements or reviews organisational strategies, systems and processes • 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 • Facilitates a climate in which creativity and innovation

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		are accepted as an integral part of achieving outcomes • Recognises that the current way is only one way of doing something and explores possibilities that challenge current approaches • Actively identifies systems, devices and applications with potential to meet current and or future needs, with the help of specialists

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT608 Manage innovation and continuous improvement	BSBMGT608C Manage innovation and continuous improvement	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

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Assessment Requirements for BSBMGT608 Manage innovation and continuous improvement

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:

- analyse and evaluate systems and performance in key areas of the organisation and identify opportunities for improvement, seeking advice from experts as appropriate
- promote the value of creativity, innovation and sustainability and recognise successes
- support the testing and trialling of new ideas and 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 effective 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.

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 cost-benefit analysis methods
- describe creativity and innovation theories and concepts
- list organisational learning principles
- identify quality management and continuous improvement theories
- describe relevant risk management concepts
- outline relevant sustainability practices.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBMGT615 Contribute to organisation development

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 contribute to the creation of an organisation development plan which ensures that the organisation will become more effective over time in achieving its goals.

It applies to individuals with organisation wide responsibilities who are critically involved in shaping and focussing the organisation so that it can adapt to new technologies, challenges and markets.

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

Unit Sector

Management and Leadership – Management

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. Develop organisation development plan	1.1 Analyse strategic plans to determine organisation development needs and objectives 1.2 Consult with relevant groups and individuals to profile the organisation's culture and readiness for organisational development 1.3 Determine who will take key roles in the organisational development process and confirm their commitment

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Collect and analyse data on areas of the business experiencing problems or that need realignment 1.5 Determine and agree on objectives and strategies for organisational development 1.6 Consider change management techniques required to achieve the workplace culture outcomes and build them into the organisation development plan 1.7 Develop communication/education plans to achieve communication objectives in relation to the desired work environment and desired approach to problem-solving and developmental activities
2. Implement organisation development activities	2.1 Identify and implement consultative processes to maximise participation in the organisation development process 2.2 Undertake team development and training activities to develop collaborative approaches to problem-solving and development 2.3 Facilitate groups to articulate problems and to propose means for resolving the problems 2.4 Manage conflict between individuals and/or groups to achieve consensus or agreement 2.5 Undertake interventions in accordance with the organisation development plan 2.6 Brainstorm alternative proposals and negotiate and agree on outcomes
3. Maintain organisation development program	3.1 Undertake surveys to identify any loss of support for organisational development programs and activities 3.2 Maintain regular team meetings and individual feedback in accordance with communication plan 3.3 Set out activities and interventions in the organisation development plan and maintain, evaluate and modify them as required 3.4 Ensure senior management reinforces organisation development program by ongoing messages of support and appropriate resource allocation 3.5 Evaluate organisation development plans in terms of costs and benefits, including opportunity costs

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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	2.2	• Participates in team development and training activities to develop skills and knowledge
Reading	1.1, 1.4, 1.5, 1.6, 1.7, 2.1, 2.5, 3.1, 3.2, 3.3, 3.5	• Evaluates and integrates facts and ideas while reviewing and interpreting organisational development processes
Writing	1.1, 1.4, 1.5, 1.6, 1.7, 2.1, 3.1, 3.2, 3.3, 3.4, 3.5	• Researches, plans and prepares documentation using vocabulary, grammatical structure and conventions appropriate to context and audience
Oral Communication	1.2, 1.3, 1.5, 2.1-2.6, 3.1, 3.2, 3.4	• Applies appropriate strategies to extract main ideas from oral texts across a range of contexts in an effort to improve organisational development
Numeracy	1.1, 1.4, 1.5, 3.5	• Selects and interprets a range of mathematical information to analyse performance, determine objectives and calculate cost-benefits of organisational development
Interact with others	1.2, 1.3, 1.5, 2.1-2.6, 3.1, 3.2, 3.4	• Recognises the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how • Recognises the importance of supportive interaction and building rapport in order 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, influencing direction and taking a leadership role • Manages conflict in the workplace through the recognition of contributing factors and by implementing resolution strategies
Get the work done	1.1, 1.3, 1.4, 1.5, 1.6, 1.7, 2.1, 2.2, 2.5, 2.6, 3.1, 3.3, 3.5	• Develops flexible plans for complex, high impact activities with strategic implications that involve multiple stakeholders with potentially competing demands • Systematically gathers and analyses all relevant information and evaluates options to make decisions about organisational development • Considers whether others should be involved in

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		decision making and, if so, uses collaborative processes • Uses analytical and lateral thinking to review current practices and develop new ideas • Actively identifies systems, devices and applications with potential to meet current and or future needs with the help of specialists

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT615 Contribute to organisation development	BSBMGT615A Contribute to organisation development	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

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Assessment Requirements for BSBMGT615 Contribute to organisation development

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:

- analyse information and data about the organisation and develop an organisation development plan including:
  - agreed objectives
  - change management and communications strategies
  - identified roles
- implement the development plan including:
  - developing the team
  - managing conflict
  - solving problems
- consult and communicate effectively with relevant stakeholders to:
  - determine agreed objectives and outcomes
  - manage conflict
  - monitor and promote participation in and support for the development activities
- evaluate the development plan and make adjustments as appropriate.

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 how to maximise participation in and support for organisation development including strategies or techniques for:
  - change management
  - consultation

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  - evaluating the process and outcomes
  - generating ideas and options
  - managing conflict and resolving problems
- outline theories of organisational behaviour and dynamics relevant to planning and implementing organisational development
- explain the impact of legislation on organisational development and change
- list aspects of organisation culture that can affect organisation development and explain how to address them in planning and implementation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation and regulation
- workplace documentation and resources
- 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

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BSBMGT616 Develop and implement strategic 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 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 implementation of the strategic plan and developing specific actions and initiatives that will be undertaken by people working in various roles.

It 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

Management and Leadership – Management

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. Confirm organisational vision and mission	1.1 Check with stakeholders that organisational vision and mission are still held to be current and are supported 1.2 Make any changes or refinements to vision or mission statement as required 1.3 Review or develop organisational values to support the vision

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ELEMENT	PERFORMANCE CRITERIA
	and mission statement 1.4 Gain support for strategic planning process from all relevant stakeholders
2. Analyse the internal and external environment	2.1 Determine information requirements and undertake or commission research to deliver relevant information 2.2 Analyse political, economic, social, and technological developments in a global context 2.3 Seek advice from appropriate experts wherever necessary 2.4 Identify and consider strengths and weaknesses of existing and potential competitors and allies 2.5 Analyse organisation's strengths, weaknesses, opportunities and threats 2.6 Consider cooperative ventures that are supported by risk and cost benefit analyses, are consistent with the organisational vision, mission and values and provide for due diligence 2.7 Check that analysis of internal and external environment is consistent with the perspectives of other informed people
3. Write strategic plan	3.1 Document relevant research and background for inclusion in the strategic plan 3.2 Formulate strategic objectives and strategies needed for the future 3.3 Detail each strategy with an assigned priority, a timeframe, responsible parties and measurable performance indicators 3.4 Circulate strategic plan for comment, support and endorsement
4. Implement strategic plan	4.1 Communicate strategic plan to all relevant parties 4.2 Brief people with a specific role in relation to strategies 4.3 Use performance indicators to monitor progress in implementing plan 4.4 Make necessary refinements to plan 4.5 Evaluate achievement of objectives at agreed milestones 4.6 Review effectiveness of plan and consider methods for improving strategic planning processes

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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, 2.4-2.6, 3.1, 3.3, 4.4-4.6	• Identifies and analyses complex organisational texts to determine business requirements • Reviews, evaluates, interprets and applies content from a range of sources to aid in development of strategies
Writing	1.2, 1.3, 2.1, 2.2, 2.4-2.6, 3.1-3.3, 4.3-4.6	• 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	1.1, 1.4, 2.3, 4.1, 4.2	• 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	2.6, 3.2, 3.3, 4.5, 4.6	• Interprets and analyses statistical data and mathematical information to consider trends and resource implications of proposed strategies
Navigate the world of work	1.1-1.3	• Works autonomously making high level decisions to achieve and improve organisational goals • Takes a lead role in the development of strategies to achieve organisational goals
Interact with others	1.1, 1.4, 2.3, 3.4, 4.1, 4.2	• 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 role in facilitating effective group interaction, influencing direction and taking a leadership role • Seeks feedback or expert advice where required
Get the work done	1.3, 2.1, 2.2, 2.4-2.7, 3.2, 4.3-4.6	• Develops flexible plans for complex, high impact activities with strategic implications, taking into account capabilities, efficiencies and effectiveness • Systematically gathers and analyses all relevant information and evaluates options to inform decisions about organisational strategies • Evaluates outcomes to identify opportunities for

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		improvement • Applies problem solving processes to identify risks, evaluate options and determine solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT616 Develop and implement strategic plans	BSBMGT616A Develop and implement strategic 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

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Assessment Requirements for BSBMGT616 Develop and implement strategic 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:

- consult and communicate effectively with relevant stakeholders to:
  - confirm or revise the organisation's mission, vision and values
  - validate findings of research and analysis
  - get input to and endorsement of strategic plans
  - brief relevant parties about the plan
- analyse organisation's internal and external environment to formulate strategic plans including:
  - background and research relevant to the plan
  - legislation, regulations and codes of practice, including for intellectual property
  - objectives, strategies and priorities
  - roles and responsibilities
  - performance indicators
  - timeframes
  - consideration of co-operative ventures
  - cost-benefit and risk analysis
- seek advice from appropriate experts wherever necessary
- monitor and evaluate the implementation of the plan and make refinements as appropriate
- review effectiveness of planning processes and identify opportunities for improvement.

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:

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- outline the legislation, regulations and codes of practice relevant to the organisation's strategic plan.
- give examples of risks and risk management strategies relevant to strategic planning including:
  - intellectual property rights and responsibilities
  - other risks
- outline strategic planning methodologies including political, economic, social and technological (PEST) analysis and strengths, weaknesses, opportunities and threats analysis (SWOT)
- identify internal and external sources of information relevant to the organisation's market, competitors, customer base, vision, values and capabilities
- outline techniques for developing organisational values.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources
- 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

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BSBMGT617 Develop and implement a business plan

Modification History

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

Application

This unit describes the skills and knowledge required to run a business operation and covers the steps required to develop and implement a business plan.

It applies to individuals who are running an organisation or who take a senior role in determining the effective functioning and success of the organisation. As such, they 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

Management and Leadership – Management

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. Develop business plan	1.1 Review and evaluate pre-existing strategic, business and operational plan, if available 1.2 Analyse and interpret business vision, mission, values and objectives 1.3 Consult with key stakeholders 1.4 Review market requirements for the product or service, profile customer needs and research pricing options

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Develop performance objectives and measures through consultation with key stakeholders 1.6 Identify financial, human and physical resource requirements for the business 1.7 Consider any permits or licences that may be required for new activity 1.8 Write business plan
2. Monitor performance	2.1 Communicate business plan to all relevant parties and ensure understanding of performance requirements and timeframes 2.2 Ensure skilled labour is available to implement plan 2.3 Test performance measurement systems and refine, if necessary 2.4 Ensure timely reports on all key aspects of the business are available, user-friendly and balanced in terms of financial and non-financial performance 2.5 Report system failures, product 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 if necessary 3.3 Ensure groups and individuals contributing to under-performance are coached, and provide training where appropriate 3.4 Review system processes and work methods regularly as part of 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	Performance Criteria	Description
Reading	1.1, 1.2, 1.4, 1.7, 2.3, 3.1, 3.2, 3.4	• Gathers, interprets and analyses textual information when developing the business plan and monitoring operational performance • Utilises understanding of distinguishing structures and features of a range of text as well as recognising and

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		reflecting on context, purpose and audience
Writing	1.1, 1.2, 1.4, 1.5, 1.8, 2.3, 2.5, 3.2, 3.3, 3.4	• 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	1.3, 1.5, 2.1, 3.3	• 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	1.1, 1.4, 1.5, 1.6, 1.8, 2.3, 2.4, 3.1, 3.2	• Extracts and evaluates mathematical information to review the market, research competitors and review pricing structures
Navigate the world of work	1.7	• Takes full responsibility for identifying and complying with legislative requirements applicable to self and the organisation
Interact with others	1.3, 1.5, 2.1, 3.3	• 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 role in facilitating effective group interaction, influencing direction and taking a leadership role • Provides support in field of expertise to colleagues, as required
Get the work done	1.2, 1.4, 1.5, 1.6, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 3.4	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Systematically gathers and analyses all relevant information and evaluates options in order to monitor performance and identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT617Develop and implement a business plan	BSBMGT617A Develop and implement a business plan	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMGT617 Develop and implement a business plan

Modification History

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

Performance Evidence

Evidence of the ability to:

- analyse and research business vision, mission, values, objectives, goals, competitors, financial targets, management arrangements, marketing approaches and strategic, business and operational plans
- write a business plan which includes a description of the business, products and services, financial, physical and human resource requirements, permit and licence requirements, marketing activity, financial indicators, productivity and performance targets for key result areas
- implement a business plan including ensuring skilled labour is available, and that training is provided where appropriate
- monitor and respond to business performance including evaluation of performance against key results indicators including profit and loss, community awareness or branding, environmental impact, governance, quality, sales, triple bottom line and the workforce
- consult, communicate with and report to key stakeholders including business partners, financiers, customers, staff and technical advisers
- provide an analysis of the strengths and weaknesses of a business 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:

- outline processes for developing business plans
- describe performance objectives and measures including key performance indicators
- identify key stakeholders.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- appropriate documentation and resources normally used in the workplace
- strategic, business and operational plans
- business information and data
- 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

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BSBMGT618 Develop an engagement centre business plan

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 business plan for a contact centre.

It applies to individuals who are required to develop, implement and maintain an effective business plan that achieves positive outcomes and supports the overall success and growth of the organisation. It requires understanding best practice, focusing on continuous improvement activities, and the justification and presentation of the plan to the organisation.

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

Unit Sector

Management and Leadership – Management

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. Analyse current situation and evaluate alternatives	1.1 Use a broad range of information sources to identify best practice criteria and examples 1.2 Analyse current performance against best practice to identify improvement and business opportunities 1.3 Identify operating requirements and constraints imposed by internal and external customers and suppliers 1.4 Review and evaluate existing strategic and operating plans to

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ELEMENT	PERFORMANCE CRITERIA
	identify opportunities for improvement 1.5 Propose viable alternatives to improve current situation and to exploit opportunities
2. Set objectives in alignment with corporate aims	2.1 Develop business objectives representing business needs and global trends 2.2 Identify business objectives which support corporate aims 2.3 Consult with key stakeholders and other relevant parties to ensure consensus on objectives 2.4 Ensure objectives reflect a competitive position in the global market
3. Prepare business plan	3.1 Develop a business plan based on agreed business objectives 3.2 Translate business objectives into a feasible strategy 3.3 Address all relevant operations in plans and justify any not addressed 3.4 Identify clear profitability, productivity and performance targets in line with objectives 3.5 Identify financial, physical and human resources requirements to implement strategies 3.6 Include appropriate feedback and customer satisfaction measurement methods in business plan 3.7 Comply with enterprise requirements for business planning 3.8 Identify risks posed by business plans 3.9 Incorporate risk management strategies for identified risks
4. Present business plan to senior management	4.1 Deliver an effective written and oral presentation of a business plan 4.2 Focus on critical aspects of the plan in the presentation 4.3 Articulate and resolve specific concerns and needs raised about the plan
5. Implement and maintain business plan	5.1 Communicate plan to team, engage team members with the plan and obtain buy in 5.2 Establish action plans, systems and processes to implement business plan 5.3 Conduct measurement programs to assess performance against business plan 5.4 Adjust systems or processes in response to performance

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ELEMENT	PERFORMANCE CRITERIA
	variations to maintain business plan 5.5 Conduct regular substantive reviews of systems and processes 5.6 Communicate performance results and issues arising to relevant stakeholders

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, 2.1, 2.2, 2.4, 3.1-3.9, 4.1-4.3, 5.1-5.6	• Gathers, interprets and analyses textual information when developing business plan and monitoring operational performance
Writing	1.2-1.5, 2.1-2.4, 3.1-3.9, 4.1-4.3, 5.1-5.6	• Communicates relationships between ideas and information, matching style of writing to purpose and audience • Prepares business plan for relevant stakeholders, according to organisational requirements
Oral Communication	1.3, 2.3, 4.1-4.3, 5.1, 5.6	• Provides information and ideas using language and features appropriate to the audience and context • Uses questioning and listening skills to identify concerns and specific needs
Numeracy	1.2, 2.1-2.4, 3.1, 3.2, 3.4, 3.5, 3.8, 3.9, 5.2, 5.3	• Interprets and evaluates mathematical information to determine current performance levels, undertake measurements and develop objectives for business plan
Navigate the world of work	2.2, 3.7	• Adheres to enterprise requirements, policies and procedures and considers own role for its contribution to broader goals of work environment
Interact with others	1.5, 2.3, 4.1-4.3, 5.1, 5.6	• Recognises 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 to achieve joint outcomes, playing a leading role in facilitating effective group interaction
Get the work	1.1-1.4, 2.1, 2.2, 2.4,	• Uses logical planning processes and an increasingly

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done	3.1-3.6, 3.8, 3.9, 4.3, 5.2-5.5	intuitive understanding of context to organise and manage tasks required to achieve objectives • Uses problem-solving skills to identify and analyse issues that arise, and create solutions • Invests time in developing and shaping several options before making decisions, using a combination of lateral and analytical thinking to tailor and strengthen an idea to suit needs, risks, resources and constraints • Analyses outcomes of decisions to identify opportunities for improvements • Using digital systems and tools to gather, analyse, organise and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT618 Develop an engagement centre business plan	BSBMGT618A Develop a contact centre business plan	Updated to meet Standards for Training Packages. Title changed to reflect industry practice.	Equivalent unit

Links

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

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Assessment Requirements for BSBMGT618 Develop an engagement centre business plan

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:

- gather and analyse information required for the business plan from a range of sources
- use information to develop business objectives and get agreement from key stakeholders
- develop a business plan according to organisational requirements and present it to key stakeholders
- implement, monitor and review a business 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:

- describe best practice or benchmarking principles in relation to business planning
- identify the organisation's aims and objectives and explain the relationship between these, and the business plan
- outline key personnel and stakeholders and their roles in the development and implementation of the business plan
- explain the principles of cost/benefit analysis
- describe recent or impending advances in technology and their possible effects on the organisation
- outline a range of risks to the organisation and explain relevant risk management techniques.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- appropriate documentation and resources normally used in the workplace
- business information and data
- 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

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BSBMGT619 Identify and implement business innovation

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 analyse the market context and current business processes to identify and implement opportunities for innovation and reform in an organisation.

It applies to those managing a knowledge management or systems development team, or working in a senior role in such a team. Those with line management responsibility would undertake this role.

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

Unit Sector

Management and Leadership - Management

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. Compare the business with competitor businesses	1.1 Investigate information on business markets, customers and methods of doing business 1.2 Analyse and compare the current market for the business and the customer base with typical business markets and customers 1.3 Analyse and contrast current business relationships, business processes and methods of doing business with other innovative businesses

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ELEMENT	PERFORMANCE CRITERIA
2. Identify business opportunities for innovation and reform	2.1 Investigate business strategies to identify opportunities for innovation and reform 2.2 Assess opportunities for their compatibility with business goals and objectives, and conduct a cost-benefit analysis for each 2.3 Evaluate the degree of likely change and the ramifications for the business and its culture for each opportunity 2.4 Conduct a risk management analysis and formulate a plan for dealing with contingencies according to organisational requirements 2.5 Rank opportunities in terms of their viability and applicability to the organisation 2.6 Include opportunities for innovation in the organisation's business strategy and prioritise them for implementation
3. Implement innovation	3.1 Redesign aspects of the business in an innovative manner according to the organisation's business strategy 3.2 Integrate innovation into the business and monitor to gauge usefulness and maximise implementation 3.3 Review business innovation in consultation with users and make recommendations for improvement or further innovation

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	• Sources and interprets a variety of textual information including industry and technical data required to plan, implement and review a strategic initiatives • Analyses organisational information using appropriate financial data to assess strategies
Writing	2.4-2.6, 3.1	• Researches, plans and prepares proposals, reports and other supporting documentation for relevant stakeholders in accordance with organisational requirements
Numeracy	2.2	• Selects and uses familiar mathematical techniques to determine costs and benefits associated with strategic decisions

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Get the work done	2.1-2.6, 3.1-3.3	• Accepts responsibility for planning, sequencing and completing complex tasks, negotiating key aspects with others and taking organisational strategy into account • Systematically gathers and analyses all relevant information and defines options to implement innovations • Evaluates outcomes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT619 Identify and implement business innovation	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

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Assessment Requirements for BSBMGT619 Identify and implement business innovation

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:

- explain the organisation's strategic directions
- develop innovations to assist the business
- produce a cost-benefit analysis of suggested innovations
- develop an implementation plan for such innovations.

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 internal and external sources of information about business markets, customers and methods
- explain the structure and goals of the business and how this impacts on business relationships, processes and methods
- compare and contrast the culture of the business versus traditional business models
- outline legal, ethical and security issues relating to business innovation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- appropriate documentation and resources normally used in the workplace
- strategic, business and operational plans
- business information and data
- case studies and, where possible, real situations

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- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBMGT621 Design and manage the enterprise quality management 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 design and manage the organisation quality management system. It covers using industry benchmarks, identifying areas for improvement across the organisation, setting targets and embedding quality into the organisational culture.

It applies to individuals in any sector or type of organisation who take an active role in establishing and maintaining systems to promote quality across the organisation.

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

Unit Sector

Management and Leadership - Management

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. Identify areas for improvement within the enterprise	1.1 Source and review relevant industry benchmarks for best practice in quality 1.2 Apply comparative analysis techniques to production performance 1.3 Identify and implement relevant codes of practice

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Audit business systems against best practice criteria 1.5 Analyse and evaluate marketing plans and quality assurance schemes 1.6 Audit human resource management practices against best practice criteria 1.7 Determine environmental/natural resources parameters and assess them against best practice
2. Establish systems to support quality	2.1 Consult with relevant parties to establish measurable targets and performance indicators for quality 2.2 Implement processes for systematic strategic planning within the organisation 2.3 Embed quality culture across the organisation 2.4 Define quality standards for products, physical and natural resources and inputs 2.5 Establish processes to generate commitment to and opportunities for learning 2.6 Implement communication strategies to inform and engage staff and other stakeholders
3. Undertake continuous monitoring of systems and processes	3.1 Establish mechanisms for gaining feedback information on quality systems and processes 3.2 Monitor and review performance against targets and performance indicators in an appropriate evaluation cycle 3.3 Develop procedures for documentation and reporting 3.4 Analyse feedback and evaluation data and implement improvements

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	1.1-1.7	• Sources and interprets textual information including benchmarks and technical data required to plan, implement and review a strategic initiative

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		• Analyses organisational information using appropriate benchmarks to assess practices
Writing	2.1, 2.4, 2.5, 3.3	• Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information, requirements and recommendations in accordance with organisational requirements
Oral Communication	2.1, 2.6	• Participates in a variety of spoken exchanges with stakeholders using structure and language appropriate to context and audience
Numeracy	1.2, 2.1	• Analyses mathematical information to define measurable performance targets
Navigate the world of work	2.4, 3.3	• Takes a lead role in the development of procedures and standards to achieve organisational goals
Interact with others	2.1, 2.3, 2.6	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective interaction, influencing direction and taking a leadership role
Get the work done	1.1, 1.3, 1.5, 1.7, 2.2- 2.6, 3.1, 3.2, 3.4	• Plans, sequences and implements complex tasks and processes to achieve organisational quality requirements • Systematically gathers, analyses and evaluates relevant information to decide on improvements • Sources feedback and evaluates outcomes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT621 Design and manage the organisation quality management system	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

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Assessment Requirements for BSBMGT621 Design and manage the enterprise quality management 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:

- use structured processes to evaluate current performance against best practice benchmarks to identify areas for improvement
- engage relevant stakeholders in establishing and maintaining evaluating systems and processes to achieve agreed quality targets
- use leadership and communication techniques to promote a quality culture
- undertake continuous monitoring of systems and 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:

- articulate quality management objectives with reference to relevant legislation, standards and codes of practice
- outline typical barriers to establishing quality systems in an organisation and possible strategies to address them
- explain change management techniques that can support the implementation of quality systems
- explain leadership and engagement strategies that can support a quality culture in an organisation
- describe benchmarking strategies for analysing production and financial performance.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources
- 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

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BSBMGT622 Manage resources

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 resources in accordance with planned business strategies. It includes analysing resource requirements, developing resource plans, allocating resources, and reviewing and reporting on resource usage.

It applies to individuals who have 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

Management and Leadership - Management

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. Analyse resource requirements	1.1 Develop resource bids in line with outputs specified in business plans 1.2 Consult with key stakeholders to determine the nature and level of resources required 1.3 Analyse resource requirements to identify proposed costs and benefits 1.4 Identify opportunities to share resources across business units

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ELEMENT	PERFORMANCE CRITERIA
	within the organisation
2. Develop resource plans to support achievement of business unit objectives	2.1 Develop resource plans that detail the acquisition and allocation of resources, timelines and the relationship to business strategies, contingencies, plans, programs and processes 2.2 Determine internal resourcing capabilities and external resourcing requirements 2.3 Develop procedures for the evaluation of resource allocation and incorporate them in resource plans 2.4 Identify risks and establish risk management processes 2.5 Apply organisation's procedures to obtain approvals from senior management
3. Allocate resources to achieve stated business objectives	3.1 Allocate resources in accordance with relevant legislation, organisational policy and practices 3.2 Manage resource allocation to enable achievement of business unit objectives 3.3 Negotiate and obtain resources within required timeframe to enable achievement of business unit objectives 3.4 Develop and implement systems to enable timely and accurate monitoring and review of resource usage 3.5 Develop or revise work practices to incorporate efficient use of resources
4. Review and report on resource usage	4.1 Develop and implement procedures to review resource allocation against business unit objectives 4.2 Monitor compliance with program and project budgets and take corrective action where necessary 4.3 Prepare reports that clearly indicate the level of performance achieved and any action taken to adjust or rectify procedures in meeting service and product delivery standards

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

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Reading	1.1, 1.3, 3.1, 3.5, 4.2, 4.3	• Interprets textual information including legislation and organisational policy, to plan, implement and review resource requirements • Analyses organisational information to assess resource usage practices
Writing	1.1, 2.1-2.4, 3.5, 4.1, 4.3	• Develops organisational texts including proposals, reports and plans in accordance with organisational requirements
Oral Communication	1.2, 2.2, 3.3	• Participates in spoken exchanges with stakeholders using structure and language appropriate to context and audience
Numeracy	1.3, 3.3, 4.2	• Selects and uses familiar mathematical techniques to determine costs and benefits associated with strategic resource decisions • Defines timeframes in accordance with schedule requirements • Selects and uses familiar mathematical techniques to organise timely supply of required resources as well as identify budgetary information and monitor performance
Navigate the world of work	2.3, 2.5, 3.1, 4.1	• Takes a lead role in the development of organisational policies and procedures • Adheres to legal requirements and organisational policies and procedures
Interact with others	1.2, 2.2, 3.3	• Collaborates and negotiates with others to achieve required outcomes
Get the work done	1.4, 2.1-2.5, 3.2-3.5, 4.2, 4.3	• 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

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.

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Risk management must consider:	• potential changes in government priorities • other risks.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT622 Manage resources	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

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Assessment Requirements for BSBMGT622 Manage resources

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:

- consult with relevant stakeholders and analyse information to determine the nature and level of resource 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 reports that clearly indicate the level of performance achieved and any adjustments needed to achieve service and product delivery standards.

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 the legislative and regulatory context of the organisation in relation to managing resources
- explain financial management and budgetary processes in the organisation in relation to resource acquisition
- explain typical risks associated with managing business resources and possible risk management strategies
- outline key elements and sources of information needed in a system to monitor usage for:
  - physical resources
  - human resources.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources
- 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

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BSBMGT623 Monitor corporate governance activities

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 and implement procedures to ensure the organisation meets its corporate governance obligations. It covers researching corporate governance trends, standards and practices, establishing processes to promote compliance, reviewing compliance and taking corrective action on non-compliances.

It applies to individuals in any sector or type of organisation with responsibility 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

Management and Leadership – Management

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 corporate governance standards and practices	1.1 Monitor the application of, and adherence to, professional and legal standards to identify emerging trends and interpretations of statutory and other regulatory requirements 1.2 Research governance audit reports and practices to assess methodologies and recommendations
2. Identify corporate	2.1 Analyse organisational practices to identify corporate

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ELEMENT	PERFORMANCE CRITERIA
governance reporting trends	governance obligations and performance 2.2 Review queries from statutory and other regulatory authorities for corporate governance failure to identify the need for changes to internal control procedures 2.3 Analyse the organisation's governance reports, returns and review processes to identify to identify whether they meet current requirements
3. Determine processes for corporate governance adherence	3.1 Analyse internal control procedures to determine corporate governance compliance performance indicators 3.2 Evaluate whether information technology systems meet corporate governance obligations for recording data from operations and transactions 3.3 Establish management processes to support corporate governance 3.4 Establish reporting plans to ensure the organisation meets compliance and reporting deadlines
4. Review corporate governance compliance	4.1 Monitor compliance performance indicators 4.2 Monitor compliance preparation processes for compliance 4.3 Analyse non-compliances to identify cause/s and implement corrective actions

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, 3.3, 3.4	• Sources and researches textual information in the context of organisational strategy and compliance requirements to support plans, monitoring and reporting
Writing	3.3, 3.4	• Develops complex texts using specialised and detailed language to convey information, requirements and recommendations in accordance with legal and organisational requirements
Navigate the world of	1.1, 2.1-2.3, 3.1, 3.2, 3.4	• Leads in the development of organisational policies, procedures to support adherence to legal and statutory requirements

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work		• Considers own role in terms of its contribution to broader goals of the organisation
Get the work done	1.1, 3.1-3.4, 4.1-4.3	• 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

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT623 Monitor corporate governance activities	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

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Assessment Requirements for BSBMGT623 Monitor corporate governance activities

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, implement, monitor and review corporate governance
- 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.

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 the legislation, regulations and statutory requirements and standards that relate to corporate governance obligations for the organisation including at least those covering:
  - 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

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- outline principles of internal control including statutory requirements
- understand statutory reporting requirements
- state the principles of valuation and apply common methods of depreciation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources including governance reports and returns
- business information technology systems
- 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

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BSBMGT624 Develop and implement corporate social responsibility

Modification History

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

Application

This unit identifies the skills and knowledge required to consult with stakeholders to develop, implement and evaluate corporate social responsibility policy in an organisation.

It 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

Management and Leadership – Management

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. Identify context for corporate social responsibility	1.1 Establish the environment for corporate social responsibility in the enterprise context 1.2 Qualify and quantify the drivers for corporate social responsibility 1.3 Identify the current and expected benefits to the enterprise from corporate social responsibility 1.4 Analyse legislation, regulation, standards and enterprise policy

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ELEMENT	PERFORMANCE CRITERIA
	that impacts on corporate social responsibility 1.5 Identify opportunities for, and barriers to, socially responsible practices
2. Engage stakeholders in setting objectives and policy	2.1 Identify stakeholders relevant to corporate social responsibility 2.2 Determine appropriate forms of engagement for different stakeholder groups 2.3 Engage and consult stakeholders to develop corporate social responsibility objectives and policy
3. Implement corporate social responsibility policy	3.1 Prepare and distribute clear documentation regarding rights and responsibilities for corporate social responsibility 3.2 Provide for effective learning and coaching and other change management strategies 3.3 Negotiate with relevant stakeholders to integrate corporate social responsibility into relevant systems, procedures and processes
4. Monitor and evaluate corporate social responsibility	4.1 Conduct regular reviews of corporate social responsibility integration with relevant persons 4.2 Evaluate corporate social responsibility against organisational goals and expected benefits 4.3 Identify and recommend improvements to corporate social responsibility policy and practices

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	1.2-1.5, 2.1	• Sources, analyses and interprets textual information in the context of complex organisational strategy and compliance requirements
Writing	2.2, 3.1, 4.3	• Prepares reports and workplace documentation that communicate strategy and related information to suit audience and context
Oral	1.5, 2.3, 3.3	• Uses specialised vocabulary and features appropriate to context to discuss and confirm requirements

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Communication		
Numeracy	1.2	• Interprets, analyses and presents numeric/financial information
Navigate the world of work	1.4, 4.2, 4.3	• Recognises, understands and applies legislation, regulation and organisational policies and procedures relevant to strategy
Interact with others	1.5, 2.3, 3.3	• Uses inclusive and collaborative techniques to cooperate and consult with others to identify options to support policy objectives
Get the work done	1.1, 2.1, 2.2, 3.2, 4.1-4.3	• 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

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT624 Develop and implement corporate social responsibility	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

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Assessment Requirements for BSBMGT624 Develop and implement corporate social responsibility

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 the context for corporate social responsibility (CSR) including:
  - legislation, regulation, standard and codes of practice
  - organisational objectives, culture and current policies and practices
  - emerging approaches and best practice in CSR
  - organisational goals, drivers and expected benefits
  - opportunities and barriers
  - stakeholders
- consult and communicate effectively with relevant stakeholder to develop corporate social responsibility objectives and policy that align to organisational goals, taking into consideration:
  - human rights practices
  - labour practices
  - environmental practices
  - fair trading practices
  - consumer relations practices
  - community involvement and development practices
- implement CSR policy including:
  - negotiating with stakeholders to integrate CSR practices into policies and procedures
  - change management and communications strategies
  - defined roles and responsibilities
- review and evaluate CSR implementation and performance and recommend improvements to policy and practices as appropriate.

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

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Knowledge Evidence

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

- outline internal and external sources of information relevant to the context for CSR
- outline the potential business benefits of improved CSR practices
- outline which areas of CSR are relevant to the context and the organisation's goals and why
- give examples of socially responsible practices relevant to the enterprise context and industry
- give examples of typical barriers to corporate social responsibility integration and possible solutions
- explain how to maximise engagement in CSR including strategies or techniques for:
  - change management
  - consultation
  - generating ideas and options
  - communicating information
  - addressing barriers and resolving problems
- outline the key provisions of legislation, covenants, standards and codes of practice relating to:
  - CSR
  - fair trade
  - human rights
  - corporate governance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- relevant legislation, regulation, standards and codes
- workplace documentation and resources
- 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

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BSBMGT801 Direct the development of a knowledge management strategy for a business

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 a knowledge management strategy as a key business enabler.

It applies to senior managers, including strategic business analysts and executive managers, who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, 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

Management and Leadership - Leadership

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. Analyse existing knowledge management systems	1.1 Evaluate existing arrangements for the capture and use of business knowledge from internal and external sources 1.2 Differentiate between knowledge management and information management systems within the organisation 1.3 Ensure the effectiveness of existing procedures and systems is

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ELEMENT	PERFORMANCE CRITERIA
	evaluated in terms of meeting the needs of clients, organisational aims, objectives and standards 1.4 Identify the need for improvements in the organisation's strategic use of knowledge
2. Evaluate knowledge management options	2.1 Investigate barriers to capturing knowledge within the organisation 2.2 Review evaluations and recommendations regarding knowledge management software with respect to its usefulness and likeliness to benefit the organisation 2.3 Review investigations into incentives and reward systems to support knowledge management 2.4 Ensure that the required processes for maintaining an integrated knowledge management system are considered 2.5 Facilitate development of a business case to determine the viability of selected options and recommend a way forward for the organisation
3. Develop a knowledge-management strategy	3.1 Develop the knowledge management business strategy in consultation with senior staff for the capture and use of organisational knowledge 3.2 Ensure that business processes are designed to support knowledge management according to organisational needs and budget 3.3 Ensure that technology requirements for implementation of the strategy are costed and included in the organisational budget cycle 3.4 Ensure that the processes for the periodic review of knowledge management metrics within the business are in place to maintain ongoing effectiveness and continuous improvement 3.5 Ensure that the knowledge management strategy meets organisational requirements identified in its overall business plan and business strategy

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

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Reading	1.1, 1.2, 2.1, 2.2, 2.3	• Sources, evaluates and critiques ideas and information from a range of complex texts • Analyses organisational information using appropriate benchmarks to establish understanding
Writing	3.1	• Researches, plans and prepares strategic business plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions
Oral Communication	2.1, 3.1	• Uses specialised vocabulary appropriate to context to discuss information and gather opinions, adjusting language and features to suit the audience
Numeracy	2.5, 3.2, 3.3	• Selects and uses familiar mathematical techniques to determine costs associated with strategic decisions
Interact with others	2.1, 3.1	• Collaborates with others to achieve joint outcomes, playing a lead role in facilitating effective interaction and influencing direction
Get the work done	1.1, 1.3, 1.4, 2.1 -2.5, 3.1-3.3	• Systematically gathers and analyses all relevant information, reviews data and evaluates options in order to inform decisions about complex organisational strategies • Accepts responsibility for planning and sequencing complex tasks and workload • Negotiates agreed outcomes and required indicators and routinely monitors and reports on them to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT801 Direct the development of a knowledge management strategy for a business	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

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Assessment Requirements for BSBMGT801 Direct the development of a knowledge management strategy for a business

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:

- research, implement, monitor and modify a knowledge management strategy for a business
- analyse and document the effectiveness of existing knowledge management systems
- research knowledge management options in the marketplace
- recommend an approach to knowledge management that meets organisational needs including a business case.

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 knowledge management concepts, processes and trends
- outline internal and external sources of information
- differentiate between knowledge management and information management systems
- describe the legal, ethical and security issues relating to knowledge management
- outline organisational change management theory and methods
- explain records management and database management principles as they relate to knowledge management, particularly meta data.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- legislation, regulations and codes of practice

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- organisational policies and procedures
- business equipment and resources
- 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

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BSBMGT802 Lead design and review of enterprise 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 design and evaluate systems to support the organisation's objectives. It covers analysis of existing systems, setting specifications and identifying and evaluating options for new or re-designed systems. It also covers implementing and evaluating the changes.

It applies to individuals who lead and review organisation-wide systems, exercise significant autonomy, responsibility and accountability within enterprise structures and make major contributions to the values, goals and operations of the enterprise. They will typically have responsibility for the establishment and review of significant systems for the organisation or enterprise. They use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, 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

Management and Leadership - Management

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. Analyse effectiveness of systems to meet	1.1 Analyse organisation's mission, direction and objectives 1.2 Determine impact of current and future market trends and

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ELEMENT	PERFORMANCE CRITERIA
organisational goals	business environment on organisation's goals and operations 1.3 Specify system requirements to meet identifiable goals 1.4 Assess capacity of existing system to meet enterprise goals 1.5 Analyse existing systems to identify system strengths, weaknesses and problem areas
2. Identify and evaluate alternatives	2.1 Research new, reconfigured or redesigned systems and components 2.2 Evaluate new, reconfigured or redesigned systems and components for suitability for enterprise product, feasibility and cost, and report outcomes to stakeholders 2.3 Negotiate organisational commitment to a new, reconfigured or redesigned system 2.4 Plan resource requirements and integrate into enterprise planning
3. Implement solutions	3.1 Develop specifications for a new, reconfigured or redesigned system 3.2 Enable the new, reconfigured or redesigned system 3.3 Negotiate, plan and communicate an implementation strategy, including work redesign with stakeholders 3.4 Identify impact on personnel and prepare change strategies 3.5 Develop, resource and implement training plans 3.6 Ensure procedures are developed, tested and refined
4. Monitor system	4.1 Establish performance criteria for the new, reconfigured or redesigned system 4.2 Collect, analyse and report performance data against system goals and performance criteria 4.3 Report and consult on progress and performance with stakeholders 4.4 Consult with stakeholders on strategies for continuous improvement to enterprise system

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 1.4, 1.5, 2.1, 2.2	• Sources, evaluates and critiques ideas and information from a range of complex texts • Analyses organisational information using appropriate benchmarks to establish understanding
Writing	1.3, 2.4, 3.1, 3.3, 3.5, 3.6, 4.1-4.3	• Develops texts dealing with complex concepts using specialised and detailed language to convey strategy context and intent and organisational requirements • Researches, plans and prepares plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions
Oral Communication	2.3, 3.3, 4.3, 4.4	• Uses language and features appropriate to context and audience to discuss progress and gather opinions
Numeracy	4.2	• Interprets, analyses and presents numeric/financial information
Interact with others	2.3, 3.3, 4.3, 4.4	• Plays a lead role in situations requiring effective collaboration and high-level negotiation skills
Get the work done	1.1, 1.2, 1.4, 1.5, 2.4, 3.2-3.6, 4.1-4.4	• Accepts responsibility for planning and sequencing complex tasks and workload • Monitors progress and results against required outcomes and reports on them to identify opportunities for improvement • Systematically gathers and analyses all relevant information, reviews data and evaluates options in order to inform decisions about complex organisational strategies

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMGT802 Lead design and review of enterprise systems	Not applicable	New unit	No equivalent unit

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Links

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

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Assessment Requirements for BSBMGT802 Lead design and review of enterprise 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:

- develop, implement, monitor and review enterprise systems
- analyse performance of existing enterprise systems against performance goals and objectives
- identify specifications for systems
- prepare a detailed business case for the introduction of new or revised enterprise system
- develop and negotiate an implementation plan for a new or revised enterprise system
- apply change management processes for new or revised systems introduction
- consult with stakeholders
- implement continuous improvement of an enterprise 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:

- explain the operation of an enterprise system and how it can support or hinder organisational goals and objectives
- detail methods for preparing a business case
- outline comparative analysis techniques
- describe sources of reliable data on systems operations
- explain high level conceptual systems models
- give examples of typical challenges to implementing new or changed enterprise systems and change management strategies to address them.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- business equipment and resources
- enterprise mission, direction and objectives
- workplace policies and procedures
- 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

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BSBMGT803 Use financial and economic information for strategic decision making

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 analyse financial and economic information to achieve the objectives of an organisation. It covers the use and interpretation of financial information to support business decision making, analysis and use of budget systems and reporting processes and the impact of micro and macro-economic information on enterprise planning.

It applies to senior management, including strategic business analysts and executive managers, who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, 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

Management and Leadership - Management

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. Analyse financial resources	1.1 Identify and incorporate the financial resources required to achieve organisational objectives from the budget

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Forecast additional expenditure requirements and make provisions in the budget as required 1.3 Develop contingency plans for obtaining additional financial resources in the event of a shortfall of available funds
2. Interpret financial and economic information	2.1 Analyse financial reports by calculating balance sheet ratios, income statement ratios and cash flow statement ratios 2.2 Identify and evaluate macro and micro economic factors and measure their impact on enterprise financial capabilities 2.3 Review and report financial performance of business units within the enterprise
3. Use financial information to support decision making	3.1 Model different financial scenarios to support the decision making process 3.2 Conduct a cost benefit analysis of organisation's activities to determine viability 3.3 Consult appropriate financial advisers about financial information to support decisions 3.4 Analyse financial information to ensure it is valid and reliable 3.5 Make strategic decisions based on up to date financial information
4. Maximise returns on financial resources	4.1 Monitor actual income and expenditure against budgets to ensure available and budgeted resources are not exceeded 4.2 Explain variations and implement corrective action when deviations in budgets occur 4.3 Collect, analyse and report data on the use of financial resources 4.4 Communicate recommendations for improving returns on financial resources to relevant parties 4.5 Agree performance indicators with managers and staff

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

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Reading	2.1-2.3	• Analyses organisational information to establish and communicate understanding
Writing	1.1, 2.3, 3.1, 4.4, 4.5	• Researches, plans and prepares information for stakeholders incorporating appropriate vocabulary, grammatical structure and numerical conventions
Oral Communication	3.3, 4.2, 4.4, 4.5	• Uses appropriate language, questioning and listening techniques to provide and elicit information and to articulate policy, plans, results and related information effectively
Numeracy	1.1-1.3, 2.1-2.3, 3.1, 3.2, 3.4, 4.1, 4.3-4.5	• Selects and uses familiar mathematical techniques to organise resources to support organisational objectives • 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
Interact with others	3.3, 4.2, 4.5	• Selects and uses appropriate conventions and protocols when communicating with stakeholders to achieve agreement and seek or share information
Get the work done	1.2, 1.3, 3.1, 3.4, 3.5, 4.1, 4.3	• Accepts responsibility for planning and sequencing complex tasks and workload • Systematically gathers and analyses all relevant information, reviews data and evaluates options to inform decisions about complex organisational strategies • Negotiates agreed plans and outcomes and required indicators and routinely monitors and reports on them to identify required corrective actions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMGT803 Use financial and economic information for strategic decision making	Not applicable	New unit	No equivalent unit

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Links

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

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Assessment Requirements for BSBMGT803 Use financial and economic information for strategic decision making

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:

- negotiate, monitor and review an enterprise financial strategy based on valid data analysis
- 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 including:
  - calculating balance sheet ratios
  - calculating income statement ratios
  - calculating cash flow statement ratios
  - monitoring income and expenditure
  - forecasting expenditure
  - developing contingency plans
  - adjusting budgets
- review and report on financial performance
- use financial data to support strategic decision making including:
  - modelling financial scenarios
  - conducting a cost benefit analysis
  - consulting with financial advisers
  - agreeing on performance indicators.

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 relevant financial and accounting principles relating to analysis and interpretation of financial reports and resources

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- summarise financial, accounting and economic terminology and systems relevant to the financial strategy
- explain techniques for calculating and analysing financial data and how they are applied.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- legislation, regulations and codes of practice
- workplace policies and procedures
- business equipment and resources
- 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

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BSBMKG401 Profile the market

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 profile a target market or market segments in accordance with a marketing plan and to develop market positioning strategies.

It 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

Business Development – Marketing

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. Segment market	1.1 Identify criteria for use in segmenting market in accordance with marketing plan 1.2 Identify and access sources of information for segmenting and profiling markets in accordance with marketing plan 1.3 Segment market in accordance with identified criteria 1.4 Review market segments for their usefulness in terms of factors such as their size, potential, distinctive needs, easy identification of members or distinctive media use patterns

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Select market segments to meet marketing objectives, and choose and apply new segmentation criteria if required
2. Identify target market	2.1 Evaluate approaches to determining and describing total market for a product or service 2.2 Define target market in terms of consumers to be included as prospective users of a product or service, and selected market segments 2.3 Use segment descriptors to describe target market 2.4 Identify available strategic marketing options and select targeting strategies that best meet requirements of the marketing plan
3. Profile target audience	3.1 Describe total market and selected market segments using a consumer profile 3.2 Identify consumer characteristics in standard statistical terms and/or descriptive terms used in media selection in consumer profile 3.3 Use demographic and/or psychographic descriptions in consumer profile in accordance with requirements of the marketing plan 3.4 Describe consumer attitudes to products or services being offered 3.5 Ensure profile meets organisational requirements of language, format, content and level of detail
4. Develop positioning strategy	4.1 Identify available positioning strategies and choose a strategy to meet marketing requirements and consumer profile 4.2 Write a positioning implementation plan containing several options, in accordance with organisational requirements 4.3 Submit plan to supervisor within specified timelines and make appropriate adjustments based on feedback

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

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Reading	1.1-1.4, 2.1, 2.2, 2.4, 3.2, 3.3, 4.1	• Gathers, interprets and analyses a variety of textual information from a range of sources to identify relevant and key information
Writing	1.3, 2.2, 2.3, 3.1-3.5, 4.2, 4.3	• Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience
Numeracy	1.1-1.5, 2.1, 2.2, 2.4, 3.2, 3.3	• Uses mathematical skills to interpret and process data and statistical information
Navigate the world of work	1.1, 1.2, 1.5, 2.4, 3.3, 3.5, 4.1, 4.2	• Adheres to implicit and explicit organisational goals, policies and procedures
Interact with others	4.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.2-1.5, 2.1, 2.4, 4.1-4.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG401 Profile the market	BSBMKG401B Profile the market	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

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Assessment Requirements for BSBMKG401 Profile the market

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 a market positioning strategy that documents market segmentation, consumer profiling, targeting and strategies relevant to a product or service being offered to the marketplace.

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 relevant information relating to the Australian Marketing Institute Code of Professional Conduct
- outline requirements of legislation affecting marketing roles
- explain data collection and analysis techniques
- outline relevant industry knowledge including:
  - components of marketing mix
  - elements of marketing planning
- explain marketing communications concepts and processes
- identify organisational structures, roles, responsibilities, business and marketing plans
- demonstrate knowledge of relevant product and service standards and best practice models
- outline relevant statistical terms used by the Australian Bureau of Statistics.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes

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- relevant workplace documentation and resources
- 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

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BSBMKG402 Analyse consumer behaviour for specific markets

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 analyse consumer behaviour for specific markets and specific needs.

It applies to individuals who need to analyse consumer behaviour to examine factors that impact decisions to purchase products or services. Having thoroughly analysed consumer attitudes and behaviour, recommendations can be made 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

Business Development – Marketing

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. Confirm product or service market	1.1 Gather information on market or market segment for a product or service in accordance with marketing plan 1.2 Identify consumer attributes for market or market segment from market profile or existing customer data 1.3 Identify and test features of product or service in accordance with marketing plan

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ELEMENT	PERFORMANCE CRITERIA
2. Assess reasons for existing levels of consumer interest	2.1 Investigate consumer need for the product or service through analysis of trends and past performance 2.2 Review past marketing or positioning of product or service in relation to effectiveness of its focus of appeal 2.3 Assess, estimate and test impact of individual, social and lifestyle influences on consumer behaviour for a product or service 2.4 Analyse consumer responses to previous marketing communications 2.5 Assess organisational capability to respond quickly to consumer demand for products or services in accordance with marketing plan
3. Recommend focus of appeal for marketing strategies for product or service	3.1 Ensure marketing strategies address innate and acquired needs of consumers and appeal to motives that influence decision-making 3.2 Present a rationale for focus of appeal that outlines how influences on consumer behaviour will be used to target effective marketing strategies 3.3 Ensure focus of appeal meets legal and ethical obligations and budgetary requirements of marketing plan

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, 2.1-2.5, 3.1, 3.3	• Interprets and analyses text from a range of sources to identify relevant and key information
Writing	1.1-1.3, 2.1, 2.3, 2.5, 3.1-3.3	• Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience
Oral Communication	1.1, 3.2	• Gathers information through active listening and questioning • Presents information using suitable words and non-verbal features

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Numeracy	1.2, 1.3, 2.1	• Uses mathematical skills and techniques to interpret and process data and analyse trends
Navigate the world of work	1.1, 1.3, 3.3	• Adheres to implicit and explicit organisational procedures and processes • Takes personal responsibility for adherence to legal/regulatory responsibilities relevant to own work context
Interact with others	3.2	• Selects and applies appropriate form and mode of communication for a specific purpose and audience
Get the work done	1.1-1.3, 2.1-2.5, 3.1, 3.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG402 Analyse consumer behaviour for specific markets	BSBMKG402B Analyse consumer behaviour for specific markets	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

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Assessment Requirements for BSBMKG402 Analyse consumer behaviour for specific markets

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:

- analyse consumer behaviours
- document and present findings and recommendations about marketing strategies that should be developed to influence consumers.

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 industry and product or service knowledge
- explain relevant marketing communication concepts and processes
- identify organisational structures, procedures and marketing objectives.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBMKG408 Conduct market research

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 market research using interview and survey methodologies (excluding specialist statistical design and analysis) and report on findings.

It applies to individuals who undertake data and information gathering and analysis as a major part of their role and are required to conduct market research. These individuals often work in areas such as marketing, communications, strategic planning and organisational development.

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

Unit Sector

Business Development – Marketing

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. Conduct desk research to gather background market information	1.1 Conduct initial desk research using appropriate sources to gather background market information 1.2 Identify options for information collection and collation tools and methods 1.3 Determine and seek approval for reporting formats for market research documentation 1.4 Report initial research findings in approved formats in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational procedures
2. Develop research methodology and objectives	2.1 Develop hypotheses and research objectives for market research 2.2 Identify options for quantifying data 2.3 Identify market research methodology and determine, develop, test and amend required survey tools 2.4 Determine and test methods of data extraction, collation and analysis
3. Recruit respondents	3.1 Interpret market research plans to identify potential respondents and their requirements 3.2 Identify respondents in line with research and organisational requirements 3.3 Recruit respondents in line with agreed research methodology and organisational requirements
4. Gather data and information from respondents	4.1 Prepare and arrange resources for data gathering 4.2 Gather data and information using survey tools 4.3 Record data and information gathered in approved formats, in accordance with organisational procedures 4.4 Store and safeguard survey information and data in accordance with organisational procedures
5. Analyse research information	5.1 Conduct checks on quality of data and information collected 5.2 Select appropriate techniques to summarise data and information 5.3 Design software files for entering data and information 5.4 Process data using a method appropriate to research design 5.5 Interpret and aggregate data and information, including categorisation, to provide observations relevant to research objectives
6. Prepare research reports	6.1 Collate and assess findings for relevance and usefulness to research objectives 6.2 Prepare research reports 6.3 Communicate research findings to relevant personnel and stakeholders in accordance with organisational procedures

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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, 2.1-2.4, 3.1-3.3, 4.1-4.4, 5.1, 5.4, 5.5, 6.1-6.3	• Interprets and analyses text from a range of sources and identifies relevant and key information
Writing	1.1, 1.3, 1.4, 2.1, 2.3, 2.4, 3.3, 4.1, 4.3, 5.3, 6.2, 6.3	• Organises content that incorporates results of research logically, using correct grammatical structure, clear language and required organisational format
Oral Communication	1.3, 3.3, 4.2, 6.3	• Presents information using suitable tone, language and syntax • Gathers information through active listening and questioning
Numeracy	1.1, 1.4, 2.4, 3.1, 4.2, 5.1-5.5, 6.1	• Extracts and evaluates mathematical information and uses a variety of techniques to interpret data and analyse trends
Navigate the world of work	1.4, 3.2, 3.3, 4.3, 4.4, 6.3	• Recognises and follows explicit and implicit organisational protocols and procedures, and meets expectations associated with own role
Interact with others	1.3, 3.3, 6.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3, 2.1-2.4, 3.1, 3.2, 4.1, 4.2, 4.4, 5.1-5.5, 6.1, 6.2	• 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 decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option • Uses digital technologies and systems safely and ethically to access, enter, organise, store and share information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG408 Conduct market research	BSBMKG408B Conduct market research	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

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Assessment Requirements for BSBMKG408 Conduct market research

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 implement a market research survey tool
- accurately record and securely store survey data in accordance with organisational procedures
- utilise a range of methodologies to analyse market research information
- document market research activities and findings in a research report.

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 key provisions of legislation, codes of practice and national standards relevant to marketing roles
- outline relevant marketing communications concepts and processes
- explain relevant market research principles and practices including:
  - data processing methods and data analysis techniques
  - design of samples
  - development and use of hypotheses
  - research reporting formats
  - roles and uses of qualitative and quantitative research
  - use of survey instruments
- outline typical information contained in a market research report, as well as requirements of a house or other style manuals or protocols for written communication.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBMKG409 Design direct response offers

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 design, implement and evaluate direct response offers which match organisational business and marketing objectives and resolve marketing problems.

It applies to individuals working in a marketing assistant or account manager role who are required to design direct marketing offers for products or services. Such individuals may work in small, medium or large enterprises across a variety of industries; they usually work with a team and customers to design offers.

Direct response offers include payment related promises such as offers in relation to exchanging goods and services for money; terms of payment; performance and quality guarantees; delivery method; and time, place and method of order placement. Offers may also be made that do not involve payment matters, such as the offer of a free brochure or catalogue in return for providing a name and address.

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

Unit Sector

Business Development – Marketing

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Design offer components	1.1 Determine what will be supplied in direct response offer in conjunction with team members 1.2 Determine what respondent must supply or do in response to offer 1.3 Select and document appropriate types of offer to be made to customers
2. Test direct response offers	2.1 Provide customers with a range of direct response offer options 2.2 Provide vehicles for customers to provide feedback on direct response offer options 2.3 Analyse customer responses to test offers and follow up if appropriate 2.4 Modify products or services being offered based on provided customer feedback 2.5 Ensure offer option selected matches organisational marketing objectives and solves marketing problems 2.6 Match supporting material requirements to type of direct marketing sale
3. Select offer pricing structure	3.1 Evaluate factors affecting pricing to determine normal or average selling price of offer 3.2 Determine short-term pricing strategies 3.3 Select payment term options
4. Determine and design required customer service levels	4.1 Design process ensuring accepted offers are fulfilled promptly 4.2 Develop procedures to ensure prompt answers to queries and complaints regarding product or service 4.3 Ensure access to instant, accurate information on status of delivery of products or services and customer accounts, including after-hours, to provide enhanced customer service

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

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Reading	1.3, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2	• Gathers, interprets and analyses textual data from a range of sources and identifies relevant and key information
Writing	1.3, 2.2-2.4, 2.6, 3.2, 4.1-4.3	• 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	1.1, 2.1-2.3, 4.3	• Participates in a variety of spoken exchanges using suitable language and features • Elicits views and opinions of others with active listening and questioning
Numeracy	3.1-3.3	• Examines and analyses numerical information to determine pricing strategies and payment terms
Navigate the world of work	2.5, 2.6, 4.2	• Recognises, develops and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.1, 2.1, 2.3, 2.4	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.3, 2.4-2.6, 3.1-3.3	• 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 • In familiar contexts, responds intuitively to problems requiring immediate attention, quickly drawing on past experience to devise solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG409 Design direct response offers	BSBMKG409A Design direct response offers	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMKG409 Design direct response offers

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:

- design and test a range of direct response offers which meet organisational marketing objectives
- develop a pricing structure, customer service levels and relevant support materials for a product or service
- present a direct response offer for a product or service
- use a range of office equipment (telephones, internet) and software (databases) to formulate and refine direct response offers.

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 typical components of design offers
- list the vehicles for gathering customer feedback
- describe the types of direct marketing sales, including support material requirements
- describe the factors that affect pricing of offers.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations.

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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

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BSBMKG410 Test direct marketing activities

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 design, construct and implement a direct marketing test program, analyse its outcomes, and act on its findings to increase the likely success of direct marketing activities.

It applies to individuals who are required to design and test direct marketing activities for a product or service. They may work in small, medium or large enterprises in a variety of industries and typically undertake controlled experiments to test direct marketing activities before designing and implementing the activity. The results of such testing can be analysed to predict likely success of proposed direct marketing activities.

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

Unit Sector

Business Development – Marketing

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. Determine appropriate testing methods	1.1 Establish rationale for conducting tests on direct marketing activities 1.2 Determine testable components of direct marketing activities that can substantially affect test results or can be differentiated without affecting other components

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Evaluate and select appropriate testing methods for media being used and media component being tested
2. Design and conduct test	2.1 Create a range of hypotheses to be tested 2.2 Formulate a number of possible scenarios expected at conclusion of test 2.3 Select minimum and maximum number of test cells 2.4 Define control cells and establish a method to identify all responses by cell of origin 2.5 Establish minimum significance variance 2.6 Apply test to selected offer components
3. Analyse and act on test results	3.1 Use statistical techniques to analyse results 3.2 Determine whether test results provide a null, positive or negative result in relation to each hypothesis 3.3 Determine appropriate testing actions for results obtained 3.4 Refine, modify or change direct response offer components in accordance with testing results until final offer is created 3.5 Document and visually present testing results in format specified by 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	Performance Criteria	Description
Reading	1.3, 3.1-3.5	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and organisational requirements
Writing	1.1, 2.1, 2.2, 2.4, 2.5, 3.4, 3.5	• Integrates information from a number of sources and develops materials that support purposes and format of the data using appropriate grammatical structure and clear, logical language
Oral Communication	1.1	• Participates in a variety of spoken exchanges using suitable language and features to develop testing rationale

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Numeracy	2.5, 3.1-3.3, 3.5	• Interprets, analyses and presents statistical information when planning activities
Navigate the world of work	3.5	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	1.1-1.3, 2.1-2.6, 3.1-3.4	• 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 • Evaluates outcomes of decisions to identify opportunities for improvement • Use digital tools to enter, analyse, organise and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG410 Test direct marketing activities	BSBMKG410A Test direct marketing activities	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

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Assessment Requirements for BSBMKG410 Test direct marketing activities

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:

- isolate and select a direct response offer component to be tested
- create and test a range of hypotheses
- conduct and re-run tests on offer components until a satisfactory outcome has been reached.

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 relevant marketing communication concepts and processes
- list various media options
- outline how statistical methods, tests, and techniques can be used for measurement and analysis
- identify software applications used in direct marketing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBMKG411 Analyse direct marketing databases

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 collect, enhance, cleanse and analyse, and utilise data for marketing purposes.

It applies to individuals in entry level marketing roles who collect, analyse and store data such as customer or prospect lists, using databases in accordance with organisational procedures. Individuals undertaking these roles also analyse data to segment and profile prospective or existing customers, or to identify new direct marketing opportunities, prior to direct marketing offers being sent.

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

Unit Sector

Business Development – Marketing

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. Collect data	1.1 Determine purpose for acquiring data 1.2 Identify and analyse data requirements 1.3 Evaluate and select appropriate database system or database management service 1.4 Use appropriate methods to collect data or source data from

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ELEMENT	PERFORMANCE CRITERIA
	external providers on prospects 1.5 Input and store data accurately, in accordance with organisational procedures and legal and ethical requirements
2. Enhance, cleanse and update data	2.1 Retrieve data in accordance with organisational requirements 2.2 Check list against 'Do not call', 'Do not mail' registers 2.3 Remove duplication from database 2.4 Regularly cleanse and update data files to maintain accuracy 2.5 Determine whether to outsource data enhancing to third party services
3. Analyse and use data for direct marketing purposes	3.1 Segment and profile data according to demographic, psychographic and behavioristic characteristics 3.2 Assess quality of data 3.3 Identify database fields with cross-selling and value-adding opportunities, and any changes in consumer behavior 3.4 Use data analysis findings to design or test new direct marketing offers or for other direct marketing purposes 3.5 Modify and enhance existing direct marketing offers or other marketing activities in accordance with analysis findings

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, 2.1-2.4, 3.1-3.5	• Gathers and analyses textual information from a range of sources and identifies relevant and key information
Writing	1.5, 2.4, 3.5	• 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
Numeracy	1.2, 1.4, 1.5, 2.1, 2.4, 3.1, 3.2, 3.4	• Interprets and analyses numerical and statistical information to analyse database information
Navigate the	1.5, 2.1	• Takes personal responsibility for adherence to legal and

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world of work		regulatory responsibilities relevant to own work context • Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	1.1-1.5, 2.1, 2.3-2.5, 3.1-3.5	• 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 • Evaluates outcomes of decisions to identify opportunities for improvement • Uses a range of digital tools to access and filter data, extract, organise and integrate information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG411 Analyse direct marketing databases	BSBMKG411A Analyse direct marketing databases	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

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Assessment Requirements for BSBMKG411 Analyse direct marketing databases

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:

- collect, store and accurately maintain customer or prospect data used in a direct marketing campaign
- segment and profile customer data according to specified characteristics
- analyse data to identify direct marketing opportunities and quality of data
- use data to design or modify new or existing marketing 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:

- identify key provisions of relevant legislation that may affect marketing operations, such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Conduct and ‘Do Not Mail’ and ‘Do Not Call’ service register
  - privacy laws
  - consumer law
- outline relevant organisational policies and procedures, products and services
- describe relevant principles and techniques for recording, filing, and cataloguing data
- list the range of database software applications used in direct marketing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

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- existing client lists and databases
- office equipment and resources
- 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

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BSBMKG412 Conduct e-marketing communications

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 prepare electronic advertisements for use in internet, email or facsimile marketing communications, and to evaluate their effectiveness in achieving marketing objectives.

It 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

Business Development – Marketing

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. Prepare electronic advertisements	1.1 Choose media for electronic advertisements in accordance with the organisation's marketing (or e-marketing) strategy 1.2 Select multiple marketing channels to optimise marketing effort 1.3 Ensure copy and design elements communicate desired image, features and benefits of products or services, and suit

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ELEMENT	PERFORMANCE CRITERIA
	characteristics of chosen media 1.4 Position and size each element of advertisement to achieve balance and focus 1.5 Ensure typeface selections suit product, chosen media and central message of advertisement, and that layout achieves balance in its elements including white space and margins 1.6 Ensure any added sound, animation or graphics enhance content of advertisements and do not distract from message 1.7 Ensure advertisements meet requirements of marketing strategy as well as legal and ethical requirements
2. Use business website as e-marketing tool	2.1 Identify website marketing objectives in organisation's marketing (or e-marketing) strategy and plan 2.2 Ensure website design meets objectives and conveys required image of the business and features and benefits of its products or services 2.3 Ensure website content, site map, navigation buttons, frames and multiple pages are in accordance with marketing strategy and plan 2.4 Ensure website incorporates data recording, contacts and feedback mechanisms to allow evaluation of website as a marketing tool
3. Use e-marketing	3.1 Identify required media vehicles and website hotlinks for electronic advertisements, and negotiate contracts for website development where necessary to meet requirements of the marketing strategy, budget and legal and ethical requirements 3.2 Promote marketing channels to identified target market segments 3.3 Place or disseminate electronic advertisements in accordance with marketing strategy, media contracts, and legal and ethical requirements
4. Monitor and evaluate results of e-marketing	4.1 Monitor transmission of electronic advertisements or other e-marketing products and rectify any errors or omissions 4.2 Develop measures of effectiveness for e-marketing advertisements and monitor effectiveness 4.3 Evaluate effectiveness of e-marketing advertisements against measures of effectiveness and record outcomes in accordance with organisational requirements 4.4 Use outcomes of evaluation activities and other feedback from

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ELEMENT	PERFORMANCE CRITERIA
	marketing channels to plan for improvements to e-marketing strategies and products

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, 1.7, 2.1-2.4, 3.1-3.3, 4.1-4.4	• Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements
Writing	1.3, 2.2-2.4, 3.2, 3.3, 4.1-4.4	• 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	3.1, 3.2	• 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
Numeracy	1.4, 1.5, 3.1, 4.2-4.4	• Uses basic mathematical skills to ensure advertisement layout designs are correct • Interprets and analyses statistical information to help design and determine measures of effectiveness
Navigate the world of work	1.1, 1.7, 3.1, 3.3, 4.3	• Appreciates the implications of ethical, legal and regulatory responsibilities related to own work • Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	3.2, 3.3	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.7, 2.1-2.4, 3.1, 4.2	• Develops plans to manage tasks with an awareness of how they may contribute to longer term operational and strategic goals • Takes responsibility for the outcomes of routine decisions related directly to own role • Understands the purposes, specific functions and key

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		features of common digital systems and tools and operates them effectively to complete routine tasks • Understands and explicitly applies some basic principles of analytical and lateral thinking • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG412 Conduct e-marketing communications	BSBMKG412A Conduct e-marketing communications	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

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Assessment Requirements for BSBMKG412 Conduct e-marketing communications

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 electronic advertisement for a product or service using electronic media to convey marketing communications consistent with an organisational marketing strategy and objectives
- monitor and evaluate results of electronic advertisements and marketing.

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 key provisions of relevant legislation, codes of practice and national standards that affect marketing operations
- describe industry products and services knowledge
- explain intellectual property requirements
- identify organisational structure, roles and responsibilities
- outline principles of marketing and advertising
- describe software applications used in conducting electronic advertising and marketing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations.

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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

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BSBMKG413 Promote products 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 coordinate and review the promotion of an organisation's products and services.

It 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

Business Development – Marketing

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. Plan promotional activities	1.1 Identify and assess promotional activities to ensure compatibility with organisational requirements 1.2 Plan and schedule promotional activities according to the marketing needs of the organisation 1.3 Determine overall promotional objectives in consultation with designated individuals and groups 1.4 Ensure that timelines and costs for promotion of activities are

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ELEMENT	PERFORMANCE CRITERIA
	realistic and consistent with budget resources 1.5 Develop action plans to provide details of products and services being promoted
2. Coordinate promotional activities	2.1 Ensure personnel and resources to support promotional activities are identified and prepared to facilitate the achievement of promotional goals 2.2 Identify and agree roles and responsibilities for delivery of promotional services and allocate to relevant personnel 2.3 Establish and conduct relationships with targeted groups in a manner which enhances the positive image of the organisation 2.4 Use networks to assist in the implementation of promotional activities
3. Review and report on promotional activities	3.1 Analyse audience feedback and data to determine the impact of the promotional activity on the delivery of products and services 3.2 Assess effectiveness of planning processes to identify possible improvements in future activities 3.3 Collect feedback and provide to personnel and agencies involved in promotional activity 3.4 Analyse costs and time lines to evaluate the benefits accruing from the promotional activities 3.5 Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of promotional activities

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, 3.1	• Interprets, analyses and collates textual information relevant to promotional activities from a range of sources
Writing	1.2, 1.5, 2.3, 3.1, 3.3, 3.5	• Uses clear and specific language to develop formal and informal documents for different audiences in accordance with organisational requirements

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Oral Communication	1.3, 2.3, 3.3, 3.5	• 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	1.4, 1.5, 3.1, 3.3, 3.4, 3.5	• Classifies, analyses and compares numeric information, including costs and timelines, relevant to the promotional activity
Navigate the world of work	1.1	• Adheres to legislative requirements and organisational policies and procedures
Interact with others	1.3, 2.3, 2.4, 3.3, 3.5	• 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
Get the work done	1.2, 1.2, 1.4, 1.5, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 3.4, 3.5	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses systematic, analytical processes in complex, non-routine situations, gathering relevant information and identifying and evaluating options against agreed requirements • Evaluates effectiveness of decisions in terms of how well they meet stated goals • Uses a range of digital tools to access data, and to extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG413 Promote products and services	BSBMKG413A Promote products 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

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Assessment Requirements for BSBMKG413 Promote products 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:

- identify the context for the promotional activities including:
  - relevant legislation/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:
  - allocation of personnel, roles and responsibilities
  - sourcing other resources and promotional products as appropriate
  - use of networks and relationships
- analyse feedback and data to evaluate the effectiveness of planning processes and promotional activities and make recommendations on future directions of promotional 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 the legislative and regulatory context of the organisation as relevant to the marketing plan
- outline the planning processes for organising promotional activities

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- explain the organisation's marketing objectives and how they support the overall business objectives
- explain how common promotional activities could be used to support the marketing objectives with reference to
  - advertising
  - client functions
  - employee functions
  - media announcements
  - product launches
  - web pages.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBMKG414 Undertake marketing activities

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, implement and manage basic marketing and promotional activities. It is a foundation unit covering general and basic marketing and promotional activities that do not require detailed or complex planning or implementation.

It applies to people with no previous experience in marketing. 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

Business Development – Marketing

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 Research marketing information	1.1 Research concept of marketing as it applies to the organisation 1.2 Identify and analyse organisation's marketing plan and relevant policies and procedures 1.3 Identify need for marketing activities from established marketing plan 1.4 Investigate previous marketing activities for relevant

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ELEMENT	PERFORMANCE CRITERIA
	information 1.5 Identify profile of market segment 1.6 Identify positioning and market mix for each target segment 1.7 Identify outcomes expected from marketing activities
2 Plan marketing activities	2.1 Undertake analysis of collected basic marketing information 2.2 Develop and document work activity plans for marketing activities 2.3 Obtain approval of plans from relevant enterprise personnel
3 Implement marketing activities	3.1 Determine and access resources required for work activities 3.2 Undertake marketing activities within job role 3.3 Assist with assigning responsibilities and functions to relevant personnel performing specific marketing functions 3.4 Monitor marketing activities, and review and amend activity plan as required
4 Review marketing activities	4.1 Measure and record outcomes of marketing activities 4.2 Review marketing activities against expected outcomes and record identified improvements 4.3 Prepare reports of marketing activities and communicate to relevant enterprise personnel

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	1.1-1.7, 2.1, 3.4, 4.2	• Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements
Writing	2.2, 3.2, 3.4, 4.1-4.3	• 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	2.3, 4.3	• Participates in a variety of spoken exchanges using

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Communication		suitable language and non-verbal features
Numeracy	3.1, 4.1-4.3	• Collates and analyses numeric information relating to costs, timeframes and other activities
Navigate the world of work	1.2, 1.3	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	2.3, 3.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.7, 2.1, 2.2, 3.1-3.4, 4.3	• Develops plans to manage tasks with an awareness of how they may contribute to longer term operational and strategic goals • Takes responsibility for outcomes of routine decisions related directly to own role • Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG414 Undertake marketing activities	BSBMKG414B Undertake marketing activities	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

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Assessment Requirements for BSBMKG414 Undertake marketing activities

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:

- research marketing practices of the organisation
- plan and implement a marketing activity
- record activities and processes used in marketing activity
- review effectiveness of marketing 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:

- describe basic foundations of marketing practices
- describe organisational policies and procedures on marketing
- outline specific product knowledge related to products and services being marketed.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- examples of products or services to be marketed
- marketing plans, policies and procedures
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBMKG415 Research international markets

Modification History

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

Application

This unit describes skills and knowledge required to undertake market research to select international markets to pursue.

It 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 involved in 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

Business Development – Marketing

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. Collect information	1.1 Identify target markets to research as new international markets

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ELEMENT	PERFORMANCE CRITERIA
about target markets	from brief or manager 1.2 Confirm information requirements for market research 1.3 Seek assistance as required, with sourcing and accessing required information 1.4 Identify and access sources of required information
2. Investigate trends in target markets	2.1 Collate required information from information sources 2.2 Apply statistical analysis tools to information to identify trends 2.3 Seek assistance as required, with analysing required information 2.4 Investigate causal influences 2.5 Document and report identified trends and causal influences to relevant personnel within organisation
3. Utilise data in decision-making	3.1 Base decision-making on available data 3.2 Check consistency of decision-making against data, and document rationale for decision-making on markets to pursue 3.3 Document and report recommendations to relevant personnel within organisation

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, 2.1, 2.2, 3.1, 3.2	• Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements
Writing	1.2, 1.3, 2.1, 2.5, 3.2, 3.3	• 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	1.1-1.3, 2.3, 2.5, 3.3	• 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

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Numeracy	2.2, 2.5	• Collates and interprets numeric information and analyses trend data relevant to marketing activities
Interact with others	1.3, 2.3, 2.5, 3.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role • Seeks assistance and guidance from others as required
Get the work done	1.1, 1.2, 1.4, 2.2, 2.4, 3.1, 3.2	• Takes responsibility for planning, organising, confirming and completing tasks to achieve required outcomes • Takes responsibility for outcomes of routine decisions related directly to own role • Evaluates effectiveness of decisions in terms of how well they meet stated goals • Initiates standard procedures when responding to familiar problems within immediate context • Uses digital tools to complete tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG415 Research international markets	BSBMKG415A Research international markets	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

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Assessment Requirements for BSBMKG415 Research international markets

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 and document trends in target market
- apply statistical analysis to validate trends
- document decision-making processes based on available data.

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 cultural aspects relevant to international markets researched
- compare and contrast market research techniques and tools
- outline required formats for reporting research outcomes
- identify and list external and internal information sources related to international markets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant workplace documentation
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBMKG416 Market goods and services internationally

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 market goods and services internationally in line with the organisation's marketing plan and marketing strategy for a specified international target market.

It applies to individuals with a broad knowledge of marketing who contribute well-developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They provide leadership and guidance to others and have limited responsibility for the output of others.

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

Unit Sector

Business Development – Marketing

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. Select appropriate marketing activities	1.1 Access marketing plan and marketing strategy for specific international target market 1.2 Seek clarification as required, to interpret marketing plan and marketing strategy 1.3 Develop a potential range of marketing activities 1.4 Select activities based on cultural and social appropriateness,

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ELEMENT	PERFORMANCE CRITERIA
	cost, viability and suitability, according to market research undertaken 1.5 Seek and obtain assistance as required, to select appropriate marketing activities 1.6 Document selected marketing activities with costs and rationale for selection and obtain approval for implementation
2. Implement international marketing activities	2.1 Prioritise marketing activities and obtain resources for their implementation 2.2 Brief others involved in marketing effort on their roles and responsibilities as members of a self-managed team to ensure success of marketing strategies 2.3 Implement promotional activities in accordance with marketing objectives and budgetary requirements 2.4 Assign responsibility for ongoing monitoring of marketing activities and evaluate business performance against objectives and targets 2.5 Ensure implementation of marketing activities meets legal, ethical and safety requirements, and cultural considerations
3. Monitor and review marketing performance	3.1 Monitor progress against performance, analyse performance gaps and take corrective action as required 3.2 Analyse over-performance against targets for trends, and set new targets 3.3 Encourage all staff involved in marketing activities to propose ways to improve marketing performance 3.4 Implement processes to gather customer reaction to all aspects of marketing mix to improve targeting and outcomes 3.5 Conduct ongoing research into customer and business requirements to identify opportunities for change and improvement, and their timing 3.6 Analyse changes in market phenomena for new business opportunities

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.4, 2.3-2.5, 3.1, 3.2, 3.5, 3.6	• Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements
Writing	1.2, 1.3, 1.6, 2.2	• 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
Oral Communication	1.2, 1.5, 2.2, 3.3	• Participates in a variety of spoken exchanges using suitable words and non-verbal features • Uses active listening and questioning to confirm requirements and understanding
Numeracy	1.4, 1.6, 2.3, 2.4, 3.1, 3.2	• Collates and interprets numeric information to analyse trend data, targets and resource requirements
Navigate the world of work	2.5	• Takes personal responsibility for adherence to legal and regulatory responsibilities relevant in own work context • Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2, 1.5, 2.2, 2.4, 3.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role • Seeks assistance and guidance from others as required
Get the work done	1.1, 1.3, 1.4, 2.1, 2.3, 2.4, 3.1, 3.4-3.6	• Develops plans to manage tasks with an awareness of how they may contribute to longer-term operational and strategic goals • Takes responsibility for outcomes of routine decisions related directly to own role • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts • Evaluates outcomes of decisions to identify opportunities for improvement

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG416 Market goods and services internationally	BSBMKG416A Market goods and services internationally	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

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Assessment Requirements for BSBMKG416 Market goods and services internationally

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:

- implement TWO culturally appropriate marketing and promotional activities
- monitor market performance
- identify and make improvements to marketing activities and 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:

- identify and describe key provisions of relevant legislation, codes of practice and national standards that affect business operations
- discuss organisational client relationship strategy
- analyse marketing concepts, principles and strategies
- analyse evaluation and monitoring principles and strategies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant workplace documentation
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBMKG501 Identify and evaluate marketing 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, evaluate and take advantage of marketing opportunities by analysing market data, distinguishing characteristics of possible markets and assessing viability of changes to operations.

It 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

Business Development – Marketing

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. Identify marketing opportunities	1.1 Analyse information on market and business needs to identify marketing opportunities 1.2 Research potential new markets and assess opportunities to enter, shape or influence each market, and the likely contribution to the business 1.3 Explore entrepreneurial, innovative approaches and creative ideas for their potential business application, and develop into potential marketing opportunities

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ELEMENT	PERFORMANCE CRITERIA
2. Investigate marketing opportunities	2.1 Identify and analyse opportunities in terms of their likely fit with organisational goals and capabilities 2.2 Evaluate each opportunity to determine its impact on current business and customer base 2.3 Use an assessment of external factors, costs, benefits, risks and opportunities to determine the financial viability of each marketing opportunity 2.4 Determine probable return on investment and potential competitors 2.5 Describe and rank marketing opportunities on their viability, and likely contribution to the business
3. Evaluate required changes to current operations	3.1 Identify and document changes needed to current operations to take advantage of viable marketing opportunities 3.2 Ensure organisational changes to service an increased or different customer base including provision for continued quality of service to existing customers 3.3 Estimate resource requirements for changed operations 3.4 Determine and communicate viability of making changes to current operations to key stakeholders 3.5 Document newly identified marketing opportunities and required changes

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, 2.1-2.4, 3.1	• Evaluates and comprehends textual information from a range of sources and draws own conclusions
Writing	1.1-1.3, 2.5, 3.1, 3.4, 3.5	• 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	2.5, 3.4	• Presents opinions, ideas and organisational requirements clearly and creatively using language and presentation techniques appropriate to audience and

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		environment • Elicits views and opinions of others by listening and questioning
Numeracy	2.3, 2.4, 3.3	• Evaluates financial and marketing data using whole numbers, decimals and percentages to make accurate calculations
Navigate the world of work	2.1	• Recognises and follows explicit and implicit organisational protocols and meets expectations associated with own role
Interact with others	2.5, 3.4	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1-1.3, 2.1-2.4, 3.1, 3.2, 3.3, 3.4	• 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 • Evaluates outcomes of decisions to identify opportunities for improvement • Develops new and innovative ideas through exploration, analysis and critical thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG501 Identify and evaluate marketing opportunities	BSBMKG501B Identify and evaluate marketing 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

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Assessment Requirements for BSBMKG501 Identify and evaluate marketing 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 and evaluate marketing opportunities to determine whether they can meet organisational objectives
- document how current business operations need to be modified, and list resources required, to take advantage of newly identified and evaluated 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:

- outline key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- describe organisational marketing plan, structure, products and services
- explain principles of marketing and marketing mix
- describe statistical methods and techniques to evaluate marketing opportunities, including forecasting techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- organisational strategic and marketing plans
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBMKG502 Establish and adjust the marketing mix

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 the optimum marketing mix for a business through analysis of interrelated marketing components.

It applies to individuals in marketing management roles who are responsible for developing marketing and promotional mix within an organisation. They may also adjust the marketing mix when new marketing opportunities are identified.

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

Unit Sector

Business Development – Marketing

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. Evaluate each component of marketing mix	1.1 Identify key characteristics of products or services and estimate their significance to the market 1.2 Review pricing policy and analyse pricing variables to determine their effect on demand 1.3 Analyse promotional methods to determine their importance to marketing outcomes 1.4 Review channels of distribution and estimate their significance

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ELEMENT	PERFORMANCE CRITERIA
	to marketing outcomes 1.5 Identify and analyse level of customer service provision to determine its significance to marketing outcomes 1.6 Identify potential customer base and key pressure points 1.7 Analyse and test effect of components of marketing mix on each other, and establish their relative importance to customer base
2. Determine marketing mix for specific markets	2.1 Identify and assess environmental factors, and their impact on marketing mix 2.2 Identify consumer priorities, needs and preferences affecting marketing mix 2.3 Consider product, pricing, promotional, distribution and service variations, and evaluate these against marketing objectives, target market characteristics and desired positioning 2.4 Select marketing mix that best satisfies target market and meets marketing objectives 2.5 Ensure marketing mix decision meets organisational, strategic and operational marketing objectives
3. Monitor and adjust marketing mix	3.1 Monitor marketing mix against marketing performance and isolate components for testing 3.2 Evaluate implications of altering one or more components of marketing mix in relation to market factors and consumer response 3.3 Adjust components of marketing mix in response to test results and market-response evaluation 3.4 Ensure adjusted marketing mix meets budgetary requirements 3.5 Ensure adjusted marketing mix continues to meet organisational, strategic and operational marketing objectives, and desired positioning

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	1.1-1.7, 2.1-2.5,	• Evaluates and comprehends textual information from a

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	3.1-3.5	range of sources
Writing	1.1-1.7, 2.1-2.3, 3.1, 3.2	• Documents results of analysis of marketing mix • Presents analysis results in required format
Numeracy	1.2, 3.2, 3.4	• Evaluates financial and marketing data using whole numbers, decimals and percentages to make accurate calculations
Navigate the world of work	2.5, 3.5	• Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Get the work done	1.1-1.7, 2.1, 2.2-2.5, 3.1-3.5	• 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 • Evaluates outcomes of decisions to identify any required adjustments

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG502 Establish and adjust the marketing mix	BSBMKG502B Establish and adjust the marketing mix	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

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Assessment Requirements for BSBMKG502 Establish and adjust the marketing mix

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:

- report on activities undertaken to establish a marketing mix in an organisation, including information on each element of the mix, such as:
  - customer service levels
  - product or service distribution
  - product or service pricing
  - additional products or services, if any
  - product or service promotion
- report on success of marketing mix activities developed, including coverage of any necessary adjustments made.

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 organisational policies, procedures, products and services related to marketing
- describe principles and concepts of marketing such as consumer or buyer behaviour and elements of marketing mix
- outline and explain statistical techniques used to gather and analyse marketing information.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

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- office equipment and resources
- organisational and marketing strategic plans
- 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

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BSBMKG506 Plan market research

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 market research by identifying market research needs, defining market research objectives, identifying data gathering approaches and developing a market research plan.

It applies to individuals in a non-market research organisation who conduct market research planning at a managerial level.

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

Unit Sector

Business Development – Marketing

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. Identify market research needs	1.1 Communicate role of market research in enterprise operations to relevant personnel 1.2 Identify contribution of market research to enterprise activity 1.3 Analyse enterprise planning and performance documentation to determine research needs 1.4 Consult relevant personnel to determine research needs 1.5 Develop statement of market research needs

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ELEMENT	PERFORMANCE CRITERIA
2. Define market research objectives	2.1 Draft research objectives 2.2 Undertake preliminary project scoping 2.3 Consult with relevant personnel on draft research objectives to ensure relevant and useful information is gathered 2.4 Review and finalise draft objectives in light of scoping parameters
3. Define data gathering approaches	3.1 Identify types of data required to inform objectives 3.2 Determine combinations of types of data to best inform objectives 3.3 Identify and evaluate suitable data gathering methods 3.4 Identify data sources 3.5 Quantify required data 3.6 Identify and evaluate suitable data processing methods 3.7 Make decisions on data types, combinations, gathering methods, sources, quantities and processing methods
4. Develop market research plan	4.1 Estimate resources and timelines required for market research projects 4.2 Determine feasibility of market research projects 4.3 Prepare market research plan for approval 4.4 Obtain approval to implement plan from appropriate personnel 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	Performance Criteria	Description
Reading	1.2, 1.3, 2.2, 2.4, 3.1, 3.3, 3.4	• Evaluates and interprets information from a range of sources and determines requirements
Writing	1.5, 2.1, 2.4, 4.3	• Integrates information from a number of sources to develop material supporting purposes of documentation, using suitable grammatical structure and clear, logical language

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Oral Communication	1.1, 1.4, 2.3, 4.4	• Participates in a variety of spoken exchanges using suitable language and non-verbal features • Elicits views and opinions of others using active listening and questioning
Numeracy	3.5, 4.1	• Interprets numerical data and makes basic calculations to determine required resources and workplace scheduling, and to quantify data
Interact with others	1.1, 1.4, 2.3, 4.4	• 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	1.3, 2.2, 2.4, 3.1-3.4, 3.6, 3.7, 4.2	• Develops plans and uses effective organisational and time-management skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • Understands and explicitly applies some basic principles of analytical and lateral thinking • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG506 Plan market research	BSBMKG506B Plan market research	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

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Assessment Requirements for BSBMKG506 Plan market research

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 and define market research requirements in an organisation
- develop a documented market research plan describing scope, objectives, time and budget for market research to be undertaken by an 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:

- outline key provisions of relevant legislation, codes of practice and national standards that affect aspects of business operations
- explain market research principles and practices including:
  - data processing methods and data analysis techniques
  - project design within given budgets and other resource constraints
  - design of samples
  - development and use of hypotheses
  - role of research in enterprise development
  - roles and uses of qualitative and quantitative research
  - use of survey instruments
- explain project planning principles and practices including for:
  - consultation and stakeholder involvement
  - development of timelines, budgets and other implementation plans
  - gaining approvals
  - needs analyses
  - scoping practices
- list statistical methods and techniques.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- data and information records from previous marketing research activities
- office equipment and resources
- 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

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BSBMKG507 Interpret market trends and developments

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 an analysis of market data in order to determine organisational and competitor business performance and to prepare market and business forecasts. The information assists in developing an organisation's marketing plan and to determine the current or potential future success of marketing strategies.

This unit applies to marketing professionals who use statistical techniques to analyse organisational and competitor marketing performance and to interpret new and emerging trends when forecasting future business needs.

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

Unit Sector

Business Development – Marketing

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. Interpret trends and market developments	1.1 Use statistical analysis of market data to interpret market trends and developments 1.2 Analyse market trends and developments for their potential impact on the business 1.3 Use measures of central tendency or dispersion and correlations between sets of data for quantitative interpretation of comparative

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ELEMENT	PERFORMANCE CRITERIA
	market data 1.4 Perform qualitative analysis of comparative market information as a basis for reviewing business performance 1.5 Analyse the market performance of existing and potential competitors and their products or services to identify potential opportunities or threats
2. Analyse qualitative results	2.1 Analyse performance data from all areas of the business to determine success of marketing activities 2.2 Identify over-performing and under-performing products and services to be considered for redevelopment or withdrawal 2.3 Forecast existing and emerging market needs based on information available using forecasting techniques
3. Report on market data	3.1 Prepare, plot and interpret data for visual presentation 3.2 Assess visual presentation for potential problems, and take any necessary corrective action 3.3 Report on analysis of market data to meet organisational requirements in terms of content, format, level of detail and scheduling

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, 1.5, 2.1, 2.3	• Researches, evaluates, analyses and interprets market information from a range of sources, and interprets requirements
Writing	3.1, 3.2, 3.3	• Prepares reports containing complex ideas and concepts and writes in a range of styles to suit different audiences
Numeracy	1.1-1.5, 2.1, 2.3	• Collects, organises and analyses data to draw conclusions or make forecasts about trends and probability • Uses specialised statistical analysis techniques
Oral Communication	3.1, 3.3	• Presents information to a range of audiences using appropriate vocabulary and non-verbal features

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Interact with others	3.1, 3.3	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to present findings
Get the work done	1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	• Develops plans and uses effective organisational and time management skills to complete tasks with an awareness of how they may contribute to longer term operational and strategic goals • Applies systematic and analytical decision making processes in complex and non-routine situations • Uses digital technologies and systems to enter and analyse data and to present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG507 Interpret market trends and developments	BSBMKG507A Interpret market trends and developments	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

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Assessment Requirements for BSBMKG507 Interpret market trends and developments

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 statistical and qualitative analysis techniques to identify:
  - current business performance
  - competitor performance
  - potential threats and opportunities
- apply qualitative and forecasting techniques to identify:
  - success of marketing activities
  - over and under-performing products and services
  - existing and emerging market needs
- document the analysis of market data including visual presentation of findings.

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 internal and external sources of information relevant to forecasting market trends including:
  - business and strategic objectives
  - marketing and other business performance
  - comparative market information
  - changes in technology
  - demographic changes
  - social and cultural factors
  - economic trends

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  - government activities and legislative changes
  - industry trends
  - supplier data
- outline the legislative and regulatory context as it applies to marketing
- identify software applications that are commonly used in quantitative and qualitative analysis and outline their key features
- outline statistical concepts, methods, techniques and reporting formats commonly used in marketing including:
  - conversion rate of leads to sales
  - measures of central tendency
  - measures of dispersion
  - nature and degree of relationship between variables
  - net response rate
  - normal distribution probability curve
  - sampling
  - speed of response curve
  - recency or frequency grids
  - lifetime value of customers
  - net present value of customers.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBMKG508 Plan direct marketing activities

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 direct marketing activities and develop marketing plans matching organisational objectives.

It applies to individuals in a marketing management role who are responsible for planning direct marketing activities, including formulating direct marketing plans, and supervising the team implementing the plans. They may work in small, medium or large enterprises across a variety of industries.

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

Unit Sector

Business Development – Marketing

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. Develop direct marketing strategies	1.1 Develop customer acquisition strategies for numbers of new customers, cost of recruiting, media options and promotional activities within an overall budget 1.2 Develop customer retention strategies on customer needs and wants, customer buying patterns, opportunities for up-selling or cross-selling, and customer renewals and reactivations 1.3 Develop customer loyalty strategies addressing relationship

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ELEMENT	PERFORMANCE CRITERIA
	marketing objectives and contributing to long-term partnerships
2. Select direct marketing activity	2.1 Analyse changes in market trends to identify and select direct marketing opportunities 2.2 Compare advantages and disadvantages of types of direct marketing activities 2.3 Select most appropriate direct marketing activity 2.4 Match direct marketing activity to business objectives
3. Produce direct marketing plan	3.1 Document direct marketing objectives and purpose 3.2 Analyse previous response data to determine performance gaps and required corrective actions 3.3 Calculate costs of direct marketing activities 3.4 Select methods to report and measure effectiveness of direct marketing activities 3.5 Assign responsibilities to team members for data capture and reporting

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	2.4	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	1.1-1.3, 3.1	• Effectively uses culturally appropriate communication to present written reports with complex concepts and ideas, to people from diverse backgrounds and with diverse abilities
Numeracy	1.1, 3.3	• Analyses statistical and financial information to determine trends and costs related to marketing activities • Sets direct marketing budgets
Navigate the world of work	2.4	• Monitors adherence to organisational objectives and policies and considers own role for its contribution to broader goals of the work environment
Get the work	1.1, 1.2, 1.3, 2.1, 2.2,	• Develops plans and uses effective organisational and

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done	2.3, 3.2, 3.4, 3.5	time-management skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses a formal decision-making process, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • Understands and explicitly applies some basic principles of analytical and lateral thinking • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG508 Plan direct marketing activities	BSBMKG508A Plan direct marketing activities	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

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Assessment Requirements for BSBMKG508 Plan direct marketing activities

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 a direct marketing plan outlining:
  - objectives of direct marketing activity
  - type of direct marketing strategies and activities to be undertaken
  - analysis of previous data and any corrective actions taken
  - budget
- explain methods to measure effectiveness.

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 economic, social, industry, and media directions, trends, practices and techniques
- outline key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- outline organisational policies and procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- previous direct marketing activity data
- relevant legislation, regulations, standards and codes

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- 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

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BSBMKG509 Implement and monitor direct marketing activities

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, monitor and evaluate effectiveness of direct marketing activities in accordance with an organisation's marketing plan.

This unit applies to individuals working in marketing management roles who are responsible for managing a team to implement direct marketing activities for a product or service. They may work in small, medium or large enterprises and across a variety of industries.

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

Unit Sector

Business Development – Marketing

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. Allocate responsibilities for direct marketing activities	1.1 Critically analyse criteria for setting priorities for direct marketing activities, in accordance with marketing plan and organisational direct marketing requirements 1.2 Assemble required resources to conduct direct marketing activities 1.3 Brief staff and suppliers on their budgets, timelines, roles and responsibilities

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Develop forms for conducting direct marketing activities and recording responses
2. Implement direct marketing activities	2.1 Schedule work on each campaign element according to lead times required for different media and in accordance with marketing plan 2.2 Ensure staff and suppliers meet agreed production schedule and budget 2.3 Identify any likely variations in production budget, raise with relevant persons as required, and gain approval for variations 2.4 Make provisions to cover promotion over-performance 2.5 Implement direct marketing activities in accordance with direct marketing plan objectives 2.6 Ensure activities are implemented in accordance with legal and ethical requirements
3. Monitor direct marketing activities	3.1 Record responses at regular intervals throughout campaign 3.2 Identify and use evaluation criteria to determine campaign effectiveness 3.3 Determine whether campaign is over-performing 3.4 Implement new targets and procedures to capitalise on positive over-performance 3.5 Modify direct marketing activities to extinguish non-profitable over-performance
4. Determine continuous improvement opportunities	4.1 Analyse success indicators of direct marketing campaign 4.2 Document campaign performance in accordance with organisational reporting requirements 4.3 Encourage team members to identify and propose ways to improve campaign performance 4.4 Determine, document and assign responsibilities for required improvements to future direct marketing campaigns

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.3, 2.1, 2.3, 2.5, 2.6, 3.2, 3.3, 4.1, 4.2	• Interprets, analyses and reviews a range of texts of relative complexity to construct, confirm and extend understanding
Writing	1.3, 1.4, 2.3, 3.1, 4.2, 4.4	• Uses clear, accurate and relevant language to organise and record information and complete workplace documentation
Oral Communication	1.3, 2.3, 4.3	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits views and opinions of others by active listening and questioning
Numeracy	1.2, 1.3, 2.1, 2.3, 3.4	• Interprets numerical data and makes basic calculations to determine target audiences, budget variations, resources and workplace timelines
Navigate the world of work	1.1, 2.1, 2.5, 2.6, 4.2	• Adheres to organisational objectives, policies and legislative requirements and considers own role for its contribution to broader goals of the work environment
Interact with others	1.3, 2.2, 2.3, 4.3, 4.4	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how • Plays a lead role in situations requiring effective collaboration, demonstrating excellent influencing and motivating skills
Get the work done	1.2, 2.1, 2.2, 2.4, 2.5, 3.2-3.5, 4.4	• Develops plans and uses effective organisational and time-management skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses a formal decision-making process, setting or clarifying goals, gathering information and analysing and evaluating several choices against a limited set of criteria • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG509 Implement and monitor direct marketing activities	BSBMKG509A Implement and monitor direct marketing activities	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

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Assessment Requirements for BSBMKG509 Implement and monitor direct marketing activities

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:

- allocate responsibilities to team members and external suppliers for direct marketing campaign
- coordinate resources, tools and personnel required to implement direct marketing campaign
- in consultation with others, monitor and evaluate performance of direct marketing campaign.

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 and explain organisational policies and procedures
- outline key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- explain what software applications, such as database software, are used for in direct marketing activities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- marketing plan
- past campaign data and information

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- 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

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BSBMKG510 Plan e-marketing communications

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 research, prepare and evaluate an organisational e-marketing plan that integrates electronic communications and website marketing to support marketing objectives.

It applies to managers working in advertising, public relations, marketing or 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

Business Development – Marketing

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. Prepare electronic marketing strategy or plan	1.1 In consultation with relevant personnel, determine electronic marketing (e-marketing) purpose and objectives reflecting organisation's strategy, direction and values 1.2 Develop an e-marketing strategy or plan that addresses aims and targets of organisation's existing business or marketing plan, and is consistent with organisational and budgetary requirements 1.3 Develop a value proposition for e-marketing strategy or plan

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify, cost and detail e-marketing tools for the organisation and its products and services in the e-marketing strategy or plan 1.5 Identify and incorporate e-marketing approaches, tools and strategies to reach target market and achieve objectives 1.6 Ensure e-marketing strategy or plan includes an action plan, schedule and budget estimates for developing and implementing e-marketing strategies 1.7 Ensure e-marketing strategy or plan includes effectiveness measures and meets legal and ethical requirements
2. Prepare and evaluate website marketing strategy	2.1 Evaluate website marketing objectives to ensure they are consistent with e-marketing strategy or plan, and modify if required 2.2 Establish strategies for evaluation of website as a marketing tool 2.3 Evaluate website design according to e-marketing strategy, to ensure the design projects required image of the organisation, and conveys features and benefits of products or services; recommend modifications if required 2.4 Evaluate website data recording, contacts and feedback mechanisms as part of website evaluation 2.5 Develop website marketing strategy in accordance with, and for inclusion in, e-marketing strategy or plan 2.6 Integrate website marketing strategy into overall e-marketing strategy 2.7 Evaluate effectiveness of website marketing strategy

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, 1.6, 1.7, 2.1, 2.4, 2.5, 2.7	• Interprets, analyses and reviews a range of texts of relative complexity to construct, confirm and extend understanding
Writing	1.2, 1.4, 1.6, 1.7,	• Uses clear, accurate and relevant language to organise and record information and complete workplace

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	2.1, 2.2, 2.3, 2.5, 2.6	documentation
Oral Communication	1.1	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits views and opinions of others with active listening and questioning
Numeracy	1.4, 2.4	• Interprets numerical data to determine resource requirements and website efficacy
Navigate the world of work	1.1, 1.2, 1.7, 2.1	• Adheres to organisational objectives and policies and considers own role for its contribution to broader goals of the work environment • Appreciates implications of legal, ethical and regulatory responsibilities related to own work
Interacts with others	1.1	• 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	1.2-1.5, 2.1-2.4, 2.7	• Develops plans and uses effective organisational and time-management skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses a formal decision-making process, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • Uses experiences to reflect on the way variables impact outcomes and to gain insights into future effective marketing strategies • Understands key principles and concepts underpinning design and operation of digital systems and tools, and applies these when seeking to understand potential of new technology

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG510 Plan e-marketing communications	BSBMKG510B Plan e-marketing communications	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMKG510 Plan e-marketing communications

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 e-marketing plan for at least ONE product or service, that meets all legislative and organisational requirements, and contains:
  - an action plan
  - a schedule
  - costings
  - a monitoring strategy
  - evaluation methods.

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 characteristics of a range of electronic marketing tools including:
  - associated benefits of use with e-marketing
  - challenges with implementation, for example costs, and availability of technology
- provide an overview of key provisions of relevant legislation, that affect marketing operations
- outline foundation principles of marketing communications, consumer behaviour and opportunities for electronic marketing.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant organisational strategies and plans
- 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

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BSBMKG511 Analyse data from international markets

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 analyse data from international markets.

It applies to individuals who possess a sound theoretical knowledge base in international business management and who have a range of managerial skills to ensure business activities are conducted effectively.

In this role, individuals specifically interpret international market trends, monitor competition and report on market data. Typically, they work as supervisors and lead teams in conducting international business activities.

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

Unit Sector

Business Development – Marketing

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. Interpret trends and market developments	1.1 Use statistical analysis of Australian and international market data to interpret international market trends and developments 1.2 Analyse trends and developments within Australia and relevant international settings for their potential impact on international

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ELEMENT	PERFORMANCE CRITERIA
	business activity within target market 1.3 Identify aspects of culture that may impact international business activity within target market 1.4 Use measures of central tendency/dispersion and correlations between sets of data for quantitative interpretation of comparative international market data 1.5 Perform qualitative analysis of comparative international market information as a basis for reviewing business performance in international settings
2. Interpret competitor market performance	2.1 Analyse international market performance of existing and potential competitors and their products or services to identify potential opportunities or threats 2.2 Compare international business performance to that of competitors to identify market position
3. Report market data	3.1 Prepare, plot and interpret data for visual presentation 3.2 Assess visual presentation for potential problems and take corrective action if necessary 3.3 Ensure report meets organisational requirements for content, format and level of detail 3.4 Submit report within the required timeframe

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	1.1-1.5, 2.1, 2.2, 3.1-3.3	• Identifies, analyses and evaluates complex textual information to determine trends and developments with reference to organisational requirements
Writing	3.1, 3.3	• Produces complex reports using clear and detailed language to convey specific information and analysis
Oral Communication	1.3	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits views and opinions of others using active listening and questioning

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Numeracy	1.1, 1.4, 1.5	• Analyses and interprets complex statistical information to interpret trends and forecast market developments
Navigate the world of work	3.3	• Monitors adherence to organisational objectives and policies and considers own role for its contribution to broader goals of work environment
Interact with others	3.4	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Get the work done	1.1-1.3, 2.1, 2.2, 3.1, 3.2	• Develops plans and uses effective organisational skills to complete tasks with an awareness of timeframes and how they may contribute to longer term operational and strategic goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • When dealing with complex issues, identifies the cause of the problem and uses analytical processes to generate possible solutions • Uses range of digitally based technology and applications to access and filter data, extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG511 Analyse data from international markets	BSBMKG511A Analyse data from international markets	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

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Assessment Requirements for BSBMKG511 Analyse data from international markets

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:

- analyse market data to inform marketing activities in an international context
- produce a marketing plan containing a comprehensive analysis of trends, developments and competitor performance data.

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 cultural, historical, political, economic and general knowledge of international events that may impact international business activity
- identify sources of external and internal information on international markets
- explain research, data analysis and statistical analysis techniques relevant to market data.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- sources of information about international markets
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBMKG512 Forecast international market and business needs

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 gather intelligence about an international target market to inform business development.

It applies to individuals who possess a sound theoretical knowledge base in international business management and who have a range of managerial and supervisory skills to ensure business activities are conducted effectively.

In this role, individuals would have responsibility for forecasting international and business needs, collecting market intelligence, reviewing current business performance and capability, evaluating specific markets and documenting how a business can meet current and emerging needs.

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

Unit Sector

Business Development – Marketing

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. Collect market intelligence	1.1 Gather and document market intelligence through networking activities and participation in activities such as trade fairs, conferences, and/or professional development activities

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Identify and access further sources of market intelligence 1.3 Evaluate commercial services providing market intelligence for value for money and quality of market intelligence, and access as required 1.4 Collate and analyse market for relevance and applicability to the organisation's international business activity and undertake an evaluation of marketing performance
2. Review current business performance and capability	2.1 Confirm core activities, customer base, business values and current business direction 2.2 Identify current international marketing performance and effectiveness of past international marketing or positioning 2.3 Review performance data from all areas of the business to identify strengths, weaknesses and critical success factors relevant to international business activity 2.4 Identify and assess current capabilities and resources to identify areas for improvement or exploitation within international markets 2.5 Identify under-performing products or services within international markets for re-development or withdrawal 2.6 Confirm the strength and current competitive position of the business within international markets
3. Evaluate the specific market	3.1 Identify and analyse trends and developments having an impact on international business activity for their potential impact on the business 3.2 Gather and analyse comparative international market information as a basis for reviewing business performance 3.3 Analyse the market performance internationally of existing and potential competitors and their products or services to identify potential opportunities or threats within international business markets 3.4 Identify and tap sources of intelligence for advance warning of new products, services, technology or new international markets for the business 3.5 Identify and analyse the legal, ethical and environmental constraints of the international market for their effect on international business activity
4. Document how business can meet current and emerging needs of the	4.1 Identify, analyse and document poor/under-servicing of existing international market needs by the organisation and/or its competitors 4.2 Identify changes in international markets that link positively to

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ELEMENT	PERFORMANCE CRITERIA
target market	the organisation's strengths or capabilities 4.3 Consider the advantages and disadvantages of forecasting techniques in relation to the required outcome, and select technique/s in accordance with organisational requirements 4.4 Forecast and justify emerging international market needs in terms of available information 4.5 Identify the needs of the business in terms of changes required to improve performance or to address an international market opportunity

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, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3, 3.4, 3.5, 4.1, 4.2, 4.3, 4.5	• Identifies, analyses and compares complex textual information to interpret market developments and opportunities
Writing	1.1, 1.4, 2.1, 4.1, 4.4	• Produces complex reports forecasting market and business needs using clear and well-organised graphical and textual information
Oral Communication	1.1, 1.2, 3.4	• Uses listening and questioning techniques to gather information and confirm understanding
Numeracy	1.3, 2.3, 3.2, 4.4	• Analyses and interprets complex business data to track strengths and weaknesses and to forecast trends
Navigate the world of work	3.5, 4.3	• Appreciates the implications of legal, ethical and regulatory responsibilities related to own work
Interact with others	1.1, 1.2, 3.4	• Identifies and uses appropriate conventions and protocols when communicating with colleagues and external stakeholders
Get the work done	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 3.3, 3.4, 4.1, 4.2,	• Develops plans and uses effective organisational skills to complete tasks with an awareness of how they may contribute to longer term operational and strategic goals • Uses systematic and analytical decision making

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	4.3, 4.4, 4.5	processes to gather and evaluate data in complex and non-routine situations • Uses a range of digital applications to access and filter data, extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG512 Forecast international market and business needs	BSBMKG512A Forecast international market and business needs	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

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Assessment Requirements for BSBMKG512 Forecast international market and business needs

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:

- analyse information from a range of sources and apply forecasting techniques to identify international market and business needs, including:
  - collection of market intelligence
  - review of current business performance and capability
  - review of effectiveness of international marketing or positioning
  - evaluation of specific international markets
  - networking and professional development
- identify opportunities for improved performance in the international market including consideration of:
  - re-development or withdrawal of under-performing products or services
  - under-serviced markets
  - market changes with a direct link to the organisation’s strengths or capabilities
  - gaps in competitor products or services
  - strategic alliances and cooperative business models
  - greater market penetration with existing products or services
  - new businesses and franchising
  - new products or services to target specific markets
- evaluate commercial services providing market intelligence and access as appropriate
- produce a written report outlining how the business can meet current and emerging needs of targeted international markets.

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

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Knowledge Evidence

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

- give examples of cultural, historical, political, economic and general knowledge of international events that may have an impact on international business activity in the industry
- explain forecasting techniques including:
  - bottom-up forecasting
  - Delphi techniques
  - model building
  - projection
  - scenario planning
  - surveys of intentions
  - top-down forecasting
- outline internal and external sources of information relevant to forecasting international market and business needs including:
  - core activities, customer base, business values and 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
- outline the legislative and regulatory context of the organisation in relation to forecasting market and business needs
- give examples of software applications that are commonly used in market analysis and forecasting and outline their key features.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBMKG513 Promote products and services to international markets

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 promote products and/or services of the business within specified international markets.

It applies to individuals with managerial responsibility including planning, coordinating, reviewing and reporting on promotional activities. Management of promotional activities may involve geographic separation from these activities.

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

Unit Sector

Business Development – Marketing

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. Plan promotional activities	1.1 Access marketing plan for international business activity to inform planning of promotional activities 1.2 Access relevant information sources to support planning of promotional activities 1.3 Identify and assess promotional activities to ensure cultural appropriateness and compatibility with organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Plan and schedule promotional activities according to marketing needs of the organisation 1.5 Determine overall promotional objectives in consultation with designated individuals and groups both in international and domestic settings 1.6 Ensure timelines and costs for promotion of activities are realistic and consistent with budget resources 1.7 Develop action plans to provide details of products and/or services being promoted
2. Coordinate promotional activities	2.1 Identify and prepare personnel and resources to support promotional activities, both in international and domestic settings, to facilitate achievement of promotional goals 2.2 Identify, agree on and allocate roles and responsibilities of overseas and domestic personnel for delivery of promotional activities 2.3 Establish and conduct relationships with targeted groups in overseas settings in a manner which enhances the positive image of the organisation 2.4 Supervise and support roles and responsibilities of overseas personnel involved in promotional activities 2.5 Use international business networks to assist in implementing promotional activities
3. Review and report on promotional activities	3.1 Analyse audience feedback and data to determine impact of promotional activity on delivery of products and/or services 3.2 Assess effectiveness of planning processes to identify possible improvements for future international promotional activities 3.3 Collect and provide feedback to personnel and agencies involved in promotional activity both in international and domestic settings 3.4 Analyse costs and timelines to evaluate benefits accruing from internationally based promotional activities 3.5 Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions for internationally based promotional activities

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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, 1.6, 3.1, 3.4	• Identifies, analyses and evaluates complex textual information including audience feedback to determine business achievements
Writing	1.4, 1.7, 3.3, 3.5	• Produces action plans, complex reports and other documentation using clear, accurate and relevant language and appropriate grammatical structure
Oral Communication	1.5, 2.1-2.5, 3.1, 3.3, 3.5	• Articulates ideas and recommendations clearly using language and technical references suitable to audience • Uses active listening and questioning to confirm understanding
Numeracy	1.6, 3.4	• Uses mathematical formulas to interpret expenditure and business timelines
Navigate the world of work	1.1, 1.3, 1.4	• Monitors adherence to organisational policies and objectives and considers own role in terms of its contribution to broader goals of the work environment
Interact with others	2.1, 2.3-2.5, 3.3, 3.5	• Begins to cultivate relationships with people with the knowledge, skills and influence to get things done or provide support, building formal and informal networks within and beyond immediate work context • 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	1.1-1.7, 2.1, 2.2, 3.1, 3.2, 3.4	• 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 goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • When dealing with complex issues identifies cause of the problem, and uses analytical processes to generate possible solutions • Monitors outcomes, considering results from a range of perspectives and identifying key concepts and principles that may be adaptable to future situations

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG513 Promote products and services to international markets	BSBMKG513A Promote products and services to international markets	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

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Assessment Requirements for BSBMKG513 Promote products and services to international markets

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, coordinate and review promotional activities undertaken in an international context
- produce a report detailing activities and recommendations to inform and guide future promotional work.

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 available overseas media
- summarise cultural characteristics of groups within target market
- list relevant international business networks
- outline marketing strategies and promotional activities suitable for international markets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- feedback on activity from overseas personnel/clients
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBMKG514 Implement and monitor marketing activities

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 and observe marketing plan objectives and action necessary improvements.

It applies to individuals who possess a sound theoretical knowledge base in advertising management, and demonstrate a range of managerial skills. In this role, they usually lead and coordinate a marketing team, implement a marketing plan, monitor performance of marketing strategies and evaluate their effectiveness.

They also involve team members in identifying improvements for marketing strategies and formulating recommendations for future marketing activities.

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

Unit Sector

Business Development – Marketing

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. Implement marketing strategies and tactics	1.1 Brief stakeholders who participated in the marketing planning process on their implementation roles and responsibilities 1.2 Identify and brief marketing and non-marketing personnel critical to success of the marketing plan, on objectives,

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ELEMENT	PERFORMANCE CRITERIA
	performance measures, and their roles and responsibilities 1.3 Prioritise marketing strategies and identify resources for their implementation, in accordance with organisational requirements 1.4 Implement communication and team building strategies to ensure personnel responsible for each element of the marketing mix work together to meet the organisation's marketing objectives 1.5 Implement strategies for monitoring marketing activities and analysing marketing performance, in accordance with marketing plan
2. Monitor marketing strategies and tactics	2.1 Monitor and implement promotional activity against communication objectives in the marketing plan 2.2 Monitor product, pricing and distribution decisions against organisational policy and objectives of the marketing plan 2.3 Monitor marketing results against targets in the marketing plan 2.4 Monitor marketing revenue and costs against budget, and analyse record variations 2.5 Prepare and present marketing reports indicating ongoing progress towards marketing objectives
3. Evaluate and improve marketing performance	3.1 Regularly assess marketing performance against objectives 3.2 Identify opportunities for improvement through discussion with customers and personnel responsible for each element of marketing mix 3.3 Change business practices in line with changing customer requirements to maintain business relevance and viability 3.4 Document recommendations for improvement in accordance with organisational requirements 3.5 Communicate changes to marketing objectives and targets with relevant stakeholders, to facilitate implementation

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

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Reading	1.3-1.5, 2.1-2.4, 3.1, 3.4	• Identifies and evaluates textual information to determine business achievements against workplace objectives
Writing	1.1, 1.2, 2.5, 3.4, 3.5	• Uses clear, accurate and relevant language to organise and record information and complete workplace documentation
Oral Communication	1.1, 1.2, 1.4, 1.5, 2.5, 3.2, 3.5	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits views and opinions of others using active listening and questioning
Numeracy	1.3, 2.2-2.4	• Uses mathematical techniques to analyse marketing performance, resource availability, revenue and cost
Navigate the world of work	1.3-1.5, 2.1-2.3, 2.5, 3.1, 3.4	• Monitors adherence to organisational policies and objectives and considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.1, 1.2, 1.4, 1.5, 2.5, 3.2, 3.5	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • 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	1.2, 1.3, 1.5, 2.1, 2.3, 2.4, 3.2, 3.3	• 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 goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • When dealing with complex issues identifies cause of the problem, and uses analytical processes to generate possible solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG514 Implement and monitor marketing	BSBMKG514A Implement and monitor marketing	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
activities	activities		

Links

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

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Assessment Requirements for BSBMKG514 Implement and monitor marketing activities

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:

- successfully implement marketing strategies identified in an organisation's marketing plan
- coordinate personnel involved in conducting marketing activities
- monitor, evaluate and report on marketing activities against defined objectives
- modify marketing activities in line with new or emerging trends.

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 organisational strategic and marketing objectives, plans and performance measures
- summarise principles of marketing mix
- explain key provisions of relevant legislation, codes of practice and national standards affecting marketing operations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- organisational and marketing strategic plans
- case studies and, where possible, real situations
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBMKG515 Conduct a marketing audit

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 prepare and manage a marketing audit, with reference to an organisation's marketing plan.

It applies to individuals who are required to develop a comprehensive description of the organisation's marketing operations as part of the marketing, planning and management 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 work of other staff.

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

Unit Sector

Business Development – Marketing

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Prepare for marketing audit	1.1 Identify main purposes of marketing audit in accordance with organisational requirements 1.2 Determine scope of marketing audit and audit methodology in accordance with organisational requirements 1.3 Determine when a marketing audit should be undertaken, in accordance with organisational requirements 1.4 Identify participants likely to be involved in carrying out a marketing audit
2. Identify form of marketing audit	2.1 Identify main characteristics of marketing audit in terms of relevance to task and audit priorities 2.2 Identity main elements to be included in marketing audit and its format, in accordance with organisational requirements 2.3 Identify various forms of marketing audit and select those that best meet requirements of marketing plan, in accordance with organisational requirements
3. Conduct external marketing audit	3.1 Identify criteria to use in external marketing audit, in accordance with organisational requirements 3.2 Identify and describe, in qualitative and quantitative terms, external environmental factors which meet requirements of audit process 3.3 Identify and describe, in qualitative and quantitative terms, technological factors, market characteristics and competitive factors relating to or affecting the business, which meet audit process requirements
4. Conduct internal marketing (self) audit	4.1 Identify criteria to use in an internal marketing audit in accordance with organisational requirements 4.2 Describe the marketing organisation in accordance with organisational and audit requirements 4.3 Describe the marketing systems in accordance with organisational and audit requirements 4.4 Identify marketing productivity in terms of profitability and cost effectiveness, and record results in accordance with organisational and audit requirements
5. Prepare marketing audit report	5.1 Write a marketing audit report in accordance with organisational requirements 5.2 Ensure marketing audit report meets reporting requirements of marketing audit form selected

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ELEMENT	PERFORMANCE CRITERIA
	5.3 Ensure marketing audit report meets requirements of the marketing plan

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, 2.1-2.3, 3.1-3.3, 4.1-4.4, 5.1, 5.3	• Identifies and evaluates complex textual information when auditing workplace documentation
Writing	3.2, 3.3, 4.2-4.4, 5.1, 5.2	• Uses clear, accurate and relevant language to organise and record information using suitable organisational formats
Oral Communication	1.4, 3.2, 3.3, 4.2, 4.3	• Participates in verbal exchanges using appropriate language and non-verbal features
Numeracy	3.2-4.4	• Interprets numerical data and makes basic calculations to audit external marketing, quantify data and determine financial gains
Navigate the world of work	1.1-1.3, 2.2, 2.3, 3.1-3.3, 4.1-4.4, 5.1, 5.3	• Adheres to organisational policies and objectives, and considers own role for its contribution to broader goals of work environment
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1	• 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 goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • Recognises and uses a range of relevant digital language and symbols • When dealing with complex issues, identifies cause of the problem, and uses analytical processes to generate possible solutions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG515 Conduct a marketing audit	BSBMKG515A Conduct a marketing audit	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

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Assessment Requirements for BSBMKG515 Conduct a marketing audit

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:

- conduct, document and report on an internal and external audit of an organisation's marketing activities, in accordance with organisational reporting 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:

- identify elements of marketing planning
- discuss organisational business and marketing plans
- explain research methodologies and data collection techniques appropriate to marketing services industry
- summarise different types of marketing audits.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- appropriate documentation and resources used to conduct marketing audit activities
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBMKG516 Profile international markets

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 select and confirm an appropriate international market.

It applies to individuals who possess a sound theoretical knowledge base in international business management, and demonstrate a range of managerial skills to ensure international business activities are conducted effectively.

In this role, individuals work in a supervisory capacity leading teams that choose appropriate international market/s by identifying a target market, profiling that market and developing a positioning strategy.

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

Unit Sector

Business Development – Marketing

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. Select potential international markets for further investigation	1.1 Determine readiness to market products or services internationally 1.2 List potential international markets for further investigation

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify information sources to inform process for selection of international markets 1.4 Determine and document criteria to determine suitability of international markets for product or service 1.5 Access and use information sources to determine suitability of international markets for product or service to be marketed 1.6 Select international markets for profiling
2. Identify target market	2.1 Evaluate and choose approaches for determining and describing total market within selected countries, for a product or service 2.2 Define target market for a product or service in terms of prospective users/consumers, selected market segment/s, and cultural appropriateness of product or service 2.3 Use segment descriptors to describe target market 2.4 Identify available marketing strategic options and select targeting strategy that best meets requirements of the marketing plan 2.5 Check cultural appropriateness of chosen targeting strategy using available information sources
3. Profile target audience	3.1 Describe total and selected market and selected market segment/s as a consumer profile 3.2 Ensure consumer profile identifies consumer characteristics in standard statistical terms and/or descriptive terms used in media selection 3.3 Use demographic data and/or psychographic descriptions in consumer profile in accordance with requirements of the marketing plan 3.4 Ensure profile meets organisational requirements for language, format, content and level of detail
4. Develop positioning strategy	4.1 Identify available positioning strategies and choose a strategy to meet marketing requirements and consumer profile, including culture of profiled groups 4.2 Check cultural appropriateness of chosen positioning strategies using available information sources 4.3 Write a positioning implementation plan in accordance with organisational requirements

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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, 2.4, 2.5, 3.3, 3.4, 4.1-4.3	• Identifies and analyses complex text to determine business requirements and possibilities
Writing	1.2, 1.4, 1.6, 2.3, 3.1, 3.2, 3.4, 4.3	• Uses clear, accurate and relevant language to organise and record information and complete workplace documentation
Oral Communication	1.5, 2.5	• Participates in verbal exchanges using appropriate language and features • Elicits views and opinions of others using active listening and questioning
Numeracy	3.2-3.4	• Analyses complex numerical data and makes conclusions using standard statistical terminology
Navigate the world of work	3.4, 4.3	• Adheres to organisational policies and objectives and considers own role for its contribution to broader goals of work environment
Get the work done	1.1, 1.3-1.6, 2.1, 2.2, 2.4, 2.5, 3.3, 4.1, 4.2	• Develops plans and uses effective organisational skills to complete tasks with awareness of how they may contribute to longer-term operational and strategic goals • Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against set of criteria • Uses digital tools to conduct and record market profiling activities

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG516 Profile international markets	BSBMKG516B Profile international markets	Updated to meet Standards for Training Packages	Equivalent unit

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Assessment Requirements for BSBMKG516 Profile international markets

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:

- complete international market profiling based on established criteria, specific targeting and positioning strategies
- produce targeting and positioning strategies accounting for cultural differences.

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:

- summarise cultural aspects relevant to international markets profiled
- explain market profiling techniques and related software programs
- outline organisational requirements for presentation of completed profile
- summarise relevant legislation, codes of practice and national standards affecting marketing operations
- identify sources of external and internal information on international markets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- examples of completed profiles
- office equipment and resources
- relevant legislation, regulations, standards and codes
- organisational and marketing strategic plans
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBMKG517 Analyse consumer behaviour for specific international markets

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 examine consumer behaviour for unique international markets.

It applies to individuals who possess a sound theoretical knowledge base in international business management, and demonstrate a range of managerial skills to ensure international business activities are conducted effectively.

In this role, individuals confirm the target market, assess current level of consumer interest and develop and document recommended marketing strategies.

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

Unit Sector

Business Development – Marketing

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. Confirm target market	1.1 Identify market or market segment for a product or service in accordance with the marketing plan 1.2 Identify aspects of culture that may impact international

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ELEMENT	PERFORMANCE CRITERIA
	marketing of products or services within target market 1.3 Identify consumer attributes for market or market segment from market profile 1.4 Identify features of products or services in accordance with marketing plan
2. Assess current level of consumer interest	2.1 Investigate consumer need for products or services through analysis of trends and past performance of products and services both within Australia and within relevant international settings 2.2 Review past marketing, including plans, strategies and campaigns or positioning of products or services for effectiveness of focus of appeal; both within Australia and within relevant international settings 2.3 Assess individual, social and cultural influences on consumer behaviour and estimate their impact for products or services 2.4 Assess lifestyle influences on consumer behaviour and estimate their impact for products or services 2.5 Assess organisational behaviour in relation to products or services in accordance with the marketing plan
3. Recommend marketing strategies	3.1 Ensure marketing strategies address innate and acquired needs of consumers, and appeal to motives that influence decision-making 3.2 Present a rationale for focus of appeal, and outline how influences on consumer behaviour and cultural considerations will be used to target effective marketing strategies 3.3 Ensure focus of appeal meets legal and ethical obligations, and budgetary requirements of the marketing plan, and check for cultural appropriateness

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, 3.1, 3.3	• Identifies and analyses complex texts to assess consumer behaviour and determine legislative requirements

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Writing	3.2	• Produces comprehensive rationale using language and structure appropriate to context and audience
Oral Communication	3.2	• Presents information using language and features appropriate to the context and audience
Numeracy	2.1, 3.3	• Interprets trends to inform understanding of consumer needs • Performs calculations to ensure plans meet budgetary requirements
Navigate the world of work	3.3	• Adheres to organisational objectives, policies and legislative requirements • Considers own role in terms of its contribution to broader goals of work environment
Interact with others	3.2	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what and how to communicate
Get the work done	1.1-1.4, 2.1-2.5	• 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 assess information required to decide on most appropriate marketing strategies • Uses digital tools to gather and analyse data about consumer behaviour

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG517 Analyse consumer behaviour for specific international markets	BSBMKG517A Analyse consumer behaviour for specific international markets	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

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Assessment Requirements for BSBMKG517 Analyse consumer behaviour for specific international markets

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:

- document process used to:
  - confirm target market
  - confirm current level of consumer interest
  - recommend marketing strategies
  - consider cultural aspects relevant to profiled market.

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 cultural aspects relevant to international markets profiled
- summarise market analysis techniques
- describe organisational requirements for presentation of completed profile
- outline key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- identify sources of external and internal information on international markets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes

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- examples of plans, strategies and campaigns
- 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

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BSBMKG518 Plan and implement services marketing

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 use a range of strategies to prepare and apply services marketing.

It applies to individuals who work in a supervisory capacity in a team environment, who possess a sound theoretical knowledge base, and demonstrate a range of managerial skills to ensure business activities are conducted effectively.

In this role, individuals may work in small, medium or large enterprises across a variety of industries. The services to be marketed may be professional services, services to consumers and business customers, or services linked to tangible products.

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

Unit Sector

Business Development – Marketing

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. Identify strategies for services marketing	1.1 Research services and their characteristics in a specific industry context 1.2 Identify marketing mix for services

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Evaluate consumer behaviour in relation to services and implications for marketing strategies 1.4 Identify factors influencing customer satisfaction with services 1.5 Identify range of strategies to market services, appropriate for the organisation
2. Select strategies for services marketing	2.1 Analyse market trends for service delivery and identify opportunities to market services 2.2 Identify previous services marketing strategies in the organisation, and analyse successful strategies and areas for improvement 2.3 Select most appropriate services marketing strategies and activities which fit the organisation's strategic and marketing plans
3. Plan and develop activities for services marketing	3.1 Record service marketing objectives and purpose 3.2 Calculate costs of service marketing activities 3.3 Select methods to report and measure effectiveness of service marketing activities 3.4 Develop effective service level agreements 3.5 Assign responsibilities to team members for service marketing activities 3.6 Record strategy plan for marketing services, and present to relevant stakeholders 3.7 Assemble required resources to implement services marketing plan
4. Implement and monitor services marketing strategy	4.1 Schedule work for each services marketing campaign element, according to lead times required for different media, and marketing plan for services 4.2 Brief staff and suppliers on their budgets, timelines, roles and responsibilities, and legal and ethical requirements 4.3 Implement services marketing activities according to marketing plan for services 4.4 Identify and use evaluation criteria and evaluation methods to determine effectiveness of marketing, and make required modifications 4.5 Analyse success indictors of marketing campaign, and record performance according to organisational reporting requirements

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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	1.1-1.5, 2.1, 4.1-4.5	• Identifies and analyses complex text to determine effective services marketing
Writing	3.1, 3.4, 3.6, 4.5	• Prepares detailed strategy plans and related workplace documentation
Oral Communication	3.6, 4.2	• Explains strategies clearly using language suitable to audience • Uses listening and questioning techniques to confirm understanding
Numeracy	3.2, 4.2, 4.5	• Uses mathematical skills to interpret budgets, timelines and overall success of campaign
Navigate the world of work	4.2, 4.5	• Monitors adherence to organisational policies and objectives and considers own role in terms of its contribution to broader goals of work environment • Appreciates implications of legal, ethical and regulatory responsibilities related to own work
Interact with others	3.6, 4.2	• Recognises 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 to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	1.1-1.5, 2.1, 2.3, 3.3-3.5, 3.7, 4.1, 4.3-4.5	• Schedules marketing strategy and develops plans with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a limited set of criteria • Recognises potential of new approaches to enhance work practices and outcomes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG518 Plan and implement services marketing	BSBMKG518A Plan and implement services marketing	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

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Assessment Requirements for BSBMKG518 Plan and implement services marketing

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 a services marketing plan providing information including:
- plan objectives
- type of service marketing strategies and activities to be undertaken
- budget
- methods to measure effectiveness
- responsibilities
- produce an analysis of an implemented services marketing strategy.

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 aspects of consumer behaviour specific to services marketing
- summarise components of a service guarantee
- outline marketing mix for services
- discuss methods of measuring marketing activity effectiveness
- explain range of marketing strategies appropriate for services
- outline range of services and their characteristics
- identify special aspects of consumer behaviour in services marketing
- describe trends in service delivery and marketing.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant organisational 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

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BSBMKG519 Plan and implement business-to-business marketing

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 implement business-to-business (B2B) marketing.

It applies to individuals who work in a supervisory capacity in a team environment, who possess a sound theoretical knowledge base and demonstrate a range of managerial skills to ensure business activities are conducted effectively.

In this role, individuals may work in small, medium or large enterprises across a variety of industries.

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

Unit Sector

Business Development – Marketing

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. Identify and evaluate business-to-business marketing strategies	1.1 Identify B2B markets in an industry context 1.2 Research characteristics of business markets in an industry context 1.3 Identify and analyse factors influencing business buyers in an

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ELEMENT	PERFORMANCE CRITERIA
	industry context 1.4 Analyse the business buying process and its implications in the industry context 1.5 Research and analyse a range of B2B marketing strategies appropriate for the organisation 1.6 Identify key personnel in buying decision process in the organisation's business markets
2. Select business-to-business marketing strategies	2.1 Analyse trends within business markets and identify B2B marketing opportunities for the organisation 2.2 Identify and analyse success of the organisation's previous B2B marketing strategies 2.3 Select most appropriate B2B marketing strategies and activities that fit with the organisation's strategic and marketing plans
3. Plan and develop business-to-business marketing activities	3.1 Record B2B marketing objectives and purpose 3.2 Calculate costs of B2B marketing activities with assistance of appropriate personnel 3.3 Select methods to report and measure effectiveness of B2B marketing activities 3.4 Assign responsibilities to team members for B2B marketing activities 3.5 Record B2B marketing plan and present to relevant stakeholders 3.6 Assemble required resources to implement B2B marketing plan
4. Implement and monitor business-to-business marketing plan	4.1 Schedule work on each B2B marketing campaign element, according to lead times required and marketing plan 4.2 Brief staff and suppliers on their budgets, timelines, roles and responsibilities, and legal and ethical requirements 4.3 Plan implementation of B2B marketing activities according to marketing plan 4.4 Identify and use evaluation criteria and evaluation methods to determine effectiveness of marketing plan 4.5 Analyse success indictors of B2B marketing plan and record performance according to organisational reporting requirements

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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, 2.1-2.3, 4.1, 4.3-4.5	• Identifies and evaluates complex text including organisational and legislative requirements
Writing	3.1, 3.4, 3.5, 4.5	• Prepares workplace documentation using appropriate terminology, grammatical structures and formatting suitable to various audiences
Oral Communication	1.1, 1.6, 3.4, 3.5, 4.2	• Participates in verbal exchanges using appropriate language and non-verbal features • Elicits views and opinions of others using active listening and questioning
Numeracy	3.2, 3.6, 4.1, 4.2	• Interprets numerical data and makes calculations to plan marketing budgets
Navigate the world of work	4.2, 4.5	• Monitors adherence to organisational policies and objectives • Appreciates implications of legal, ethical and regulatory responsibilities related to own work • Considers own role in terms of its contribution to broader goals of work environment
Interact with others	3.2, 3.5, 4.2	• Recognises 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 to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	1.1-1.6, 2.1-2.3, 3.3, 3.4, 3.6, 4.1, 4.3-4.5	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify relevant information, risks and strategies • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • Recognises potential of new approaches to enhance work practices and outcomes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG519 Plan and implement business-to-business marketing	BSBMKG519A Plan and implement business-to-business marketing	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

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Assessment Requirements for BSBMKG519 Plan and implement business-to-business marketing

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:

- produce a business-to-business (B2B) marketing plan which includes:
  - marketing objectives and strategies
  - a detailed marketing budget
  - methods of measuring effectiveness
  - assigning responsibilities within a team
- implement a B2B marketing 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:

- summarise key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- explain business buying processes
- outline characteristics of business markets compared to consumer markets
- summarise factors influencing business buyers
- discuss a range of strategies for B2B marketing
- describe trends in B2B marketing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

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- office equipment and resources
- relevant legislation, regulations, standards and codes
- examples of strategies and campaigns
- 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

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BSBMKG520 Manage compliance within the marketing legislative framework

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 comply with the legislative structure of the marketing industry and use this for competitive advantage.

It applies to individuals who work across a variety of industries and who possess a sound theoretical knowledge base, and demonstrate a range of managerial skills to ensure business activities are conducted legally and effectively.

A sound working knowledge of the legal environment in which marketing decisions are made is essential to protect a business from litigation, and individuals in these roles must competently discuss legal issues with specialists, but do not make legal decisions independently.

An in-depth understanding of the legislative operating environment also informs the development of marketing strategies.

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

Unit Sector

Business Development – Marketing

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1. Identify and interpret legislative framework relating to marketing	1.1 Identify and locate current information about legislation relating to marketing decision-making in the industry context 1.2 Identify codes of practice as they relate to marketing, and analyse their implications in the industry context 1.3 Analyse how legislation relating to marketing can protect and assist the trader, consumer and competitive process 1.4 Identify sources of information and advice about the legislative framework relating to marketing, and analyse them for usefulness in the industry context
2. Promote a culture of compliance with legislative framework relating to marketing	2.1 Identify benefits and essential components of the legal compliance program relating to marketing, and how they fit with the overall organisation compliance program 2.2 Participate in a marketing compliance audit and make recommendations to address identified gaps 2.3 Identify possible implications of non-compliance and use them to recommend changes to practice 2.4 Design a training program to educate staff on compliance as it relates to marketing
3. Recommend strategies to use legislative framework relating to marketing for competitive advantage	3.1 Identify and analyse a range of methods to protect the organisation's products and services being marketed against intellectual property breaches 3.2 Make recommendations on strategies for protection of intellectual property rights, and present to key stakeholders 3.3 Make recommendations to implement systems to identify intellectual property infringement by third parties 3.4 Identify remedies for own and other organisations' breaches of marketing legislation which could impact the organisation 3.5 Access and effectively use others' intellectual property within legal guidelines for business advantage

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 2.1-2.3, 3.1, 3.5	• Identifies, analyses and evaluates complex legal documentation and interprets the impact on business
Writing	2.2-2.4, 3.2-3.5	• Prepares complex compliance documentation using appropriate terminology to convey clear meanings to team members and relevant stakeholders
Oral Communication	3.2, 3.3	• Explains compliance information using language suitable to audience • Uses listening and questioning techniques to confirm understanding
Navigate the world of work	1.1-1.4, 2.1, 3.1-3.5	• Keeps abreast of legislation and regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking work • Monitors adherence to organisational policies and objectives and considers own role in terms of its contribution to broader goals of work environment
Interact with others	3.2, 3.3	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • 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, 1.4, 2.1, 2.3, 2.4, 3.1, 3.4	• Develops plans and uses effective organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • When dealing with complex issues, identifies the cause of the problem, and uses analytical processes to generate possible solutions

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG520 Manage compliance within the marketing legislative framework	BSBMKG520A Manage compliance within the marketing legislative framework	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

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Assessment Requirements for BSBMKG520 Manage compliance within the marketing legislative framework

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 and apply legislation and codes of practice to marketing
- promote a culture of compliance within the legislative framework relating to marketing
- develop strategies which use the legislative framework for competitive advantage.

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 components of a compliance program and compliance audit
- summarise different methods for protection of intellectual property
- outline key provisions of legislation, codes of practice and standards as they relate to marketing
- identify sources of information and advice on compliance with law.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBMKG521 Plan and implement sponsorship and event marketing

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 propose and implement sponsorships and events for specific brands/products.

It 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, and demonstrate a range of managerial skills to ensure business activities are conducted legally and effectively.

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

Unit Sector

Business Development – Marketing

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. Investigate sponsorship and event marketing opportunities	1.1 Research and identify sponsorship and event marketing opportunities 1.2 Analyse advantages and disadvantages of a range of sponsorships and events 1.3 Identify target audience for potential sponsorship and event marketing, and analyse motivation

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify legal, cultural and ethical requirements related to sponsorship and event marketing 1.5 Use a range of criteria to select sponsorships and events which would be effective for marketing to the target audience
2. Plan sponsorship and event marketing	2.1 Develop and record objectives and purpose of sponsorship and event marketing 2.2 Analyse and record how sponsorships and events fit with other marketing strategies and business objectives 2.3 Calculate costs of chosen sponsorships and events, and establish a budget 2.4 Plan timelines for implementation and continuation of sponsorships and events 2.5 Produce and present a sponsorship and event marketing proposal in a format appropriate to the organisation
3. Initiate implementation of sponsorships and events	3.1 Initiate negotiations required to proceed with sponsorships and events 3.2 Draft contracts for sponsorships and events under guidance of relevant experts 3.3 Assemble required resources to implement sponsorship and event marketing 3.4 Brief key staff on their required input to sponsorships and events and schedule work
4. Monitor and evaluate sponsorships and events	4.1 Identify and use evaluation criteria to determine effectiveness of sponsorships and event marketing arrangements 4.2 Develop a range of methods to evaluate effectiveness 4.3 Recommend modifications to sponsorship and event marketing arrangements in line with evaluation 4.4 Record improvement opportunities discovered during evaluation, to be used for current and future sponsorship and event marketing plans

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.5, 2.2, 4.1, 4.2	• Identifies and analyses complex text to identify sponsorship and marketing opportunities
Writing	2.1, 2.2, 2.5, 3.2, 4.2, 4.4	• Prepares detailed documentation using appropriate terminology and format to convey clear messages to team members and relevant stakeholders
Oral Communication	1.3, 2.5, 3.1, 3.2, 3.4, 4.3	• Participates in verbal exchanges using appropriate language and non-verbal features • Uses active listening and questioning to confirm understanding
Numeracy	2.3, 2.4	• Uses mathematical skills to develop budgets and calculate work timeframes
Navigate the world of work	1.4, 2.2	• Understands own legal rights and responsibilities and extends this understanding across cultural and ethical protocols • Adheres to organisational policies and objectives and considers own role for its contribution to broader goals of work environment
Interact with others	2.5, 3.1, 3.2, 3.4, 4.3	• Cultivates relationships with people with the knowledge, skills and influence to get things done or provide support, building formal and informal networks within and beyond immediate work context • 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	1.1-1.3, 1.5, 2.2, 2.4, 3.3, 4.1, 4.2, 4.4	• Develops plans for sponsorships and events using effective organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • When dealing with complex issues, identifies the cause of the problem, and uses analytical processes to generate possible solutions • Uses each experience to reflect on opportunities for improvements in future

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG521 Plan and implement sponsorship and event marketing	BSBMKG521A Plan and implement sponsorship and event marketing	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

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Assessment Requirements for BSBMKG521 Plan and implement sponsorship and event marketing

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:

- show development of a sponsorship and event marketing plan that includes:
  - objectives and purpose of strategy
  - a comprehensive rationale
  - a detailed budget
  - an implementation plan
  - methods to measure effectiveness
- implement a sponsorship AND an event marketing strategy, including draft contracts and evidence of negotiations
- evaluate success of sponsorship and event marketing strategy.

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 sponsorships and events suitable for marketing in own context
- outline methods of evaluating effectiveness of sponsorship and event marketing strategies
- explain sources of advice available on contract requirements for sponsorship and event marketing.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

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- office equipment and resources
- relevant workplace documents and dat
- 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

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BSBMKG522 Plan measurement of marketing effectiveness

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, plan and promote a strategy to measure effectiveness of marketing activities using a range of marketing metrics.

It applies to individuals working in a marketing operations or supervisory role within a marketing team responsible for using and reporting measurements of marketing effectiveness. They may work in small, medium or large enterprises and in a variety of industries.

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

Unit Sector

Business Development – Marketing

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. Identify and analyse measurement of marketing effectiveness	1.1 Research a range of metrics available to identify effectiveness of marketing processes and functions 1.2 Identify marketing metrics used by the organisation in each key marketing operation 1.3 Identify how existing marketing metrics link to organisational strategy and objectives, and opportunities to improve the links 1.4 Analyse effectiveness of current and possible future marketing

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ELEMENT	PERFORMANCE CRITERIA
	metrics 1.5 Identify issues with using marketing metrics within the organisation
2. Develop strategy to measure marketing effectiveness	2.1 Identify the organisation's criteria for selecting manageable and cost-effective metrics 2.2 Identify the organisation's objectives for measurement and evaluation of marketing effectiveness 2.3 Recommend methods of measuring marketing performance for each marketing process or function tailored to the organisation's brand or unique positioning 2.4 Contribute to calculation of costs of gathering and analysing data 2.5 Plan and document implementation strategy for measuring and analysing marketing performance 2.6 Contribute to development of specific, relevant metrics
3. Promote strategy to measure marketing effectiveness	3.1 Plan promotion of validity, value and efficacy of marketing metrics to key stakeholders using appropriate format 3.2 Design an internal marketing communications strategy so marketing and other relevant personnel fully understand their role in measuring marketing effectiveness 3.3 Report on implementation and outcome issues

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	1.1-1.5, 2.1, 2.2, 2.4-2.6	• Identifies and evaluates complex data to determine business requirements
Writing	2.3, 2.5, 2.6, 3.1-3.3	• Prepares detailed communication strategy and related workplace documentation using clear and comprehensive terminology to convey explicit information, requirements and recommendations
Oral	2.3, 3.3	• Articulates strategies and presents reports clearly using

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Communication		language and non-verbal features suitable to audience • Uses listening and questioning to confirm understanding
Numeracy	1.5, 2.1, 2.4, 2.6	• Uses mathematical skills to analyse data, evaluate cost-efficacy of business activities and select appropriate metrics
Navigate the world of work	1.2, 1.3	• Monitors adherence to organisational policies and objectives and considers own role for its contribution to broader goals of work environment
Interact with others	2.3, 2.6, 3.1, 3.3	• 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, 1.3-1.5, 2.1, 2.2, 2.5, 2.6, 3.1, 3.2	• Develops plans to design and implement strategy to measure marketing effectiveness using organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals • In more complex, non-routine situations, uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating several choices against a set of criteria • When dealing with complex issues, identifies cause of problem, and uses analytical processes to generate possible solutions • 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG522 Plan measurement of marketing effectiveness	BSBMKG522A Plan measurement of marketing effectiveness	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMKG522 Plan measurement of marketing effectiveness

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 a strategy to measure marketing performance, which includes:
  - objectives
  - metrics chosen and rationale for choice for each marketing process or function
  - a detailed budget
  - links to organisational strategy and objectives
  - a communication 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:

- outline range of criteria for selecting metrics
- explain range of marketing functions within an organisation
- summarise range of marketing metrics and their usefulness to measure key marketing operations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant workplace documents and data, in particular data already collected to measure marketing effectiveness
- office equipment and resources, including appropriate software

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- 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

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BSBMKG523 Design and develop an integrated marketing communication plan

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 and evaluate the range of marketing communication options and media, to design an integrated marketing communication plan, and to develop a marketing communication brief and creative brief reflecting client needs and preferences.

It 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

Business Development – Marketing

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. Determine marketing communication requirements	1.1 Confirm marketing communication purpose and objectives with client 1.2 Obtain comprehensive client and product information 1.3 Review outcomes of previous marketing communication with client

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Confirm budget allocation with client
2. Develop marketing communication brief	2.1 Develop brief, ensuring it contains a client profile, purpose statement and objectives reflecting client needs 2.2 State marketing communication objectives in measurable terms and provide specific guidelines on what is to be accomplished by marketing communication 2.3 Define key characteristics, competitive factors and market situation facing product or service 2.4 Include a summary of information on target audience, and legal and ethical constraints
3. Design integrated marketing communication strategy	3.1 Select marketing communication options appropriate for marketing communication brief 3.2 Critically analyse advantages and disadvantages of each marketing communications variable and media vehicles for product or service 3.3 Determine media characteristics matching brief requirements 3.4 Analyse media consumption habits for primary and supplementary marketing media among target audiences 3.5 Evaluate media styles against the brand character of product or service being marketed 3.6 Compare advantages and disadvantages of selecting multiple media in a media plan 3.7 Develop and apply criteria for selecting multiple media combinations
4. Select and recommend media for marketing strategy	4.1 Select media vehicles that match requirements of marketing brief for product or service 4.2 Recommend primary and secondary marketing media that meet target audience preferences 4.3 Ensure recommended media meet the brief, client's requirements, and legal and ethical constraints
5. Develop creative brief	5.1 Identify creative content for chosen media using consumer language in the brief 5.2 Identify pitch or appeal for product or service in the brief that meets client requirements 5.3 Identify supporting information required for consumer understanding of product or service in the brief

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Ensure budget for creative work, consistent with overall marketing budget, is contained in the brief 5.5 Incorporate deadline for creative work consistent with overall media schedule in the brief

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, 2.1-2.4, 3.3-3.7, 5.3	• Accesses information from a range of sources and identifies, interprets and analyses information relevant to marketing activities
Writing	1.1, 1.3, 1.4, 2.1-2.4, 5.1-5.5	• Uses clear, specific and culturally appropriate language to articulate potentially complex ideas, issues and concepts to clients • Uses appropriate formats and structures information logically to present ideas and recommendations to clients
Oral Communication	1.1, 1.3, 1.4	• Actively participates in verbal exchanges by listening and questioning to clarify and confirm information • Uses appropriate language and non-verbal features to clarify, explain and present information on marketing activities
Numeracy	1.4, 2.2, 3.4, 5.4	• Collates and interprets numeric information to analyse trend data, develop targets and prepare budgets for marketing activities
Navigate the world of work	2.4, 4.3	• Considers legal and ethical implications in relation to own role
Get the work done	1.1-1.4, 3.1-3.7, 4.1, 4.2, 5.1-5.5	• Plans, organises and implements tasks to achieve outcomes, with an awareness of client requirements, time and budgetary restraints • Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option • Evaluates outcomes of decisions to identify opportunities for improvement • Develops new and innovative ideas through

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		exploration, analysis and critical thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG523 Design and develop an integrated marketing communication plan	BSBMKG523A Design and develop an integrated marketing communication plan	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

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Assessment Requirements for BSBMKG523 Design and develop an integrated marketing communication plan

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:

- produce an integrated strategic marketing communication plan for presentation to a client, including:
  - purpose statement
  - definition of target audience
  - analysis of product or service
  - legal and ethical constraints
  - marketing communication functions and media vehicles chosen, with rationale for each
  - creative brief for media options
  - schedule for creative work
  - budgetary allocation for each media vehicle.

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 economic, social and industry trends relevant to choice of appropriate media options
- analyse industry products or services to recommend appropriate media options
- summarise key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- explain principles of consumer behaviour and influences on buyer behaviour
- summarise range of marketing communication options for different markets
- describe and contrast range of media vehicles for marketing communication options.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- 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

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BSBMKG603 Manage the marketing process

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 strategically manage the marketing process and marketing personnel within an organisation.

It applies to senior personnel who are responsible for managing the overall marketing process of an organisation, and for managing marketing personnel. Typically they 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

Business Development – Marketing

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. Manage marketing performance	1.1 Manage marketing effort to ensure it is directed towards areas of greatest potential for the organisation 1.2 Manage integration of marketing, promotional and sales activities in accordance with strategic marketing objectives 1.3 Monitor product, distribution, pricing and marketing communication policies according to market movements, marketing plan objectives and organisational requirements 1.4 Use marketing metrics to monitor overall marketing progress

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ELEMENT	PERFORMANCE CRITERIA
	against performance targets, ensuring activity, quality, cost, and time requirements are met
2. Manage marketing personnel	2.1 Communicate strategic marketing objectives across the organisation in ways suited to levels of knowledge, experience and specific needs of personnel 2.2 Identify and agree roles, responsibilities and accountabilities of staff and contractors involved in all elements of marketing effort 2.3 Develop communication strategy to ensure personnel responsible for each element in the marketing mix work together to meet organisation's marketing objectives 2.4 Provide mentoring, coaching and feedback to support individuals and teams to achieve agreed objectives and use resources to required standard 2.5 Identify individual and team performance, and instigate corrective action promptly to safeguard marketing outcomes
3. Evaluate and improve strategic marketing performance	3.1 Analyse marketing outcomes, review strategic objectives and marketing metrics, and revise if required 3.2 Analyse successes and performance gaps considering cause and effect, and use this to improve strategic performance 3.3 Analyse over-performance against targets for trends and set new targets 3.4 Analyse changes in market phenomena, and identify and document their impact on strategic marketing objectives 3.5 Document review of marketing performance against key performance indicators in accordance with 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	Performance Criteria	Description
Learning	2.4	• Actively reinforces own knowledge and skills by mentoring and coaching others
Reading	1.2-1.4, 3.1-3.5	• Accesses information from a range of sources and accurately interprets and analyses data relevant to

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		marketing process
Writing	2.1-2.5, 3.4, 3.5	• Prepares detailed documentation using appropriate terminology and format to convey clear messages to team members and relevant stakeholders
Oral Communication	2.1, 2.2, 2.4	• Participates in verbal exchanges using appropriate vocabulary and non-verbal features to articulate information • Uses active listening and questioning to confirm understanding
Numeracy	1.3, 1.4, 3.3	• Analyses and evaluates complex numeric information relating to budgets, targets and trend data
Navigate the world of work	1.2, 1.3, 2.3, 3.1, 3.4, 3.5	• Monitors adherence to organisational policies and objectives • Considers own role for its contribution to broader goals of work environment
Interact with others	2.1-2.4	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • 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	1.1-1.4, 2.5, 3.1, 3.2, 3.4	• 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 • Recognises and addresses some unfamiliar problems of increasing complexity within own scope • Supports new ideas on the basis of their contribution to achievement of broader goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG603 Manage the marketing process	BSBMKG603B Manage the marketing process	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBMKG603 Manage the marketing process

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:

- monitor marketing performance across an organisation by comparing performance against key performance indicators
- effectively communicate marketing objectives to relevant personnel in accordance with organisation requirements
- provide feedback, mentoring and coaching to staff
- capitalise on over-performance or minimise under-performance against marketing objectives.

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:

- summarise economic, social and industry directions, trends and practices
- outline different organisational structures, roles, responsibilities and policies
- describe own/relevant industry product and service knowledge
- explain principles of marketing, strategic analysis and strategic management
- summarise statistical and data evaluation techniques to measure marketing performance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- interaction with others

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- 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

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BSBMKG605 Evaluate international marketing 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 evaluate the international environment, identify market factors and risks, and to assess viability of international marketing opportunities.

It applies to experienced individuals who use specialised knowledge to evaluate the international business environment in preparation for entering an international or export market for the first time, or to identify new marketing opportunities in markets in which their organisation already has a presence.

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

Unit Sector

Business Development – Marketing

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. Review global market environment	1.1 Assess international trade patterns and identify their likely importance for the business 1.2 Research international business and electronic commerce market factors, and assess opportunities to enter, shape or influence the market for their likely contribution to the business 1.3 Identify international markets operating under free trade or

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ELEMENT	PERFORMANCE CRITERIA
	protectionist arrangements and estimate likely ease of entering and trading successfully 1.4 Identify international trade policies and agreements and estimate their likely impact on international marketing opportunities
2. Assess international business and electronic commerce market factors	2.1 Identify and analyse impact of economic, political, social and cultural factors affecting international marketing opportunities 2.2 Investigate international market trends and developments to identify market needs relevant to the business 2.3 Identify new and emerging business and electronic commerce markets, and assess opportunities to enter, shape or influence markets based on their fit with business goals and direction, and their likely contribution to the business
3. Identify risk factors for international marketing opportunities	3.1 Analyse and rate acceptability of political, financial stability and corruption risk factors of potential market 3.2 Analyse and rate acceptability of legal and regulatory requirements, and trade barriers to potential market 3.3 Relate risk factors to international business cycles in terms of economic conditions and estimate their impact on potential market
4. Investigate international business and electronic commerce marketing opportunities	4.1 Identify and analyse international marketing opportunities according to their likely fit with the organisation’s goals and capabilities 4.2 Evaluate each opportunity to determine its impact on current business and customer base 4.3 Use an assessment of costs, benefits, risks and opportunities to determine financial viability of each marketing opportunity 4.4 Determine probable return on investment and potential competitors 4.5 Describe and rank marketing opportunities in terms of viability and likely contribution to the business

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

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	Criteria	
Reading	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1, 4.2	• Researches and analyses a range of textual information from a variety of sources to identify key details and determine relevance to strategic organisational requirements
Writing	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1, 4.2, 4.5	• Records results of research and analysis using language and format appropriate to organisation and purpose
Numeracy	1.1, 1.2, 2.2, 4.3-4.5	• Performs complex mathematical calculations to analyse trend data, business development opportunities and cost benefit analyses
Navigate the world of work	1.4, 3.2, 4.1	• Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking work • Understands and adheres to organisational policies and objectives
Get the work done	1.1-1.4, 2.1- 2.3, 3.1-3.3, 4.2, 4.3, 4.4	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify risk factors, and to evaluate alternative strategies and resources • 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 • Recognises potential of new approaches, including new technologies, to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG605 Evaluate international marketing opportunities	BSBMKG605B Evaluate international marketing opportunities	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBMKG605 Evaluate international marketing 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:

- document and present an evaluation of various international marketing opportunities including:
  - analysis of global business environment
  - assessment of social, cultural, political and economic factors impacting selection of market opportunities
  - risk assessment for each opportunity considered
  - analysis of financial viability of selected international marketing 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:

- outline relevant Australian and international standards, policies and guidelines, including those covering:
  - environmental matters
  - human rights
  - labour relations
  - packaging
  - risk management
- electronic commerce
- identify and explain key provisions of relevant legislation and codes of practice affecting aspects of marketing operations
- explain the role of the Organisation for Economic Co-operation and Development (OECD)

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- identify and describe key features of the country or countries being considered for market entry or penetration, including:
  - cross-cultural communication and negotiation styles
  - global and country specific economic, social and industry directions, trends, practices and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- information sources on countries and markets being considered for entry or further penetration
- office equipment and resources
- examples of previous international marketing evaluation documents, strategic plans and marketing 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

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BSBMKG606 Manage international marketing programs

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 formulate, assess, strategically manage, evaluate and improve international marketing programs.

It applies to experienced individuals who are required to manage a team and are responsible for evaluating international marketing opportunities, setting marketing objectives and determining approach and operational structure for an organisation marketing internationally.

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

Unit Sector

Business Development – Marketing

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. Formulate international marketing objectives	1.1 Select viable international marketing opportunities and develop objectives consistent with the organisation's capabilities and resources 1.2 Identify measurable international marketing objectives consistent with organisation's strategic direction, and identify nature and extent of goals for international market 1.3 Formulate strategic objectives and related key performance indicators by product, service, country or international grouping,

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ELEMENT	PERFORMANCE CRITERIA
	and overall 1.4 Develop a risk management strategy to manage contingencies, and ensure marketing objectives are met in accordance with overall organisational requirements
2. Determine international marketing approach	2.1 Research international marketing opportunities and determine global or customised approaches for promotion of products or services 2.2 Evaluate options for choice of marketing approaches 2.3 Select a marketing approach to meet marketing objectives, international market conditions and consumer preferences
3. Determine operational structures	3.1 Evaluate business culture and consumer preferences, and identify compatible marketing structures 3.2 Identify options for operational marketing structure and rank them for strengths and weaknesses in servicing international markets 3.3 Choose operational structure that best fits international market and product or service
4. Manage international marketing performance	4.1 Communicate international marketing objectives across the organisation to suit culture, customs, levels of knowledge, experience and needs of personnel 4.2 Identify and agree roles, responsibilities and accountabilities of staff and contractors involved in all elements of marketing effort 4.3 Develop communication strategy to ensure personnel responsible for each element of marketing mix work together to meet organisation’s marketing objectives 4.4 Manage marketing effort to ensure it is directed towards areas of greatest potential for the organisation 4.5 Manage integration of marketing, promotional and any sales activities in accordance with international marketing objectives
5. Evaluate and improve international marketing performance	5.1 Monitor product, pricing and distribution policies in relation to market changes, objectives of marketing plan and organisational requirements 5.2 Monitor overall marketing progress against performance targets to ensure activity, quality, cost, and time requirements are met 5.3 Analyse, review and revise marketing outcomes and objectives 5.4 Analyse successes and performance gaps as to cause and

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ELEMENT	PERFORMANCE CRITERIA
	effect, and use to improve international marketing performance 5.5 Analyse changes in market phenomena, and identify and document their potential impact on international marketing objectives 5.6 Document review of marketing performance against key performance indicators in accordance with 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	Performance Criteria	Description
Reading	1.2, 2.1, 2.2, 3.1, 5.3-5.5	• Researches, analyses and consolidates a range of complex textual information from a variety of sources to identify key details and determine relevance to strategic organisational requirements
Writing	1.3, 1.4, 4.1, 4.3, 5.3, 5.6	• Uses clear and accurate language and structures information logically to convey priorities and critical strategic information • Prepares a range of reports using appropriate format, terminology and conventions specific to purpose and audience
Oral Communication	4.1	• Clearly and effectively conveys and elicits information in verbal exchanges • Uses active listening and questioning skills to clarify understanding
Numeracy	5.2	• Performs calculations and uses mathematical problem-solving techniques to analyse numerical and financial data
Navigate the world of work	1.2, 1.4, 4.5, 5.1, 5.6	• Monitors adherence to organisational policies and objectives and considers own role for its contribution to broader goals of work environment
Interact with others	4.1, 4.3	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and how

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		• Fosters a collaborative culture within own sphere of influence, facilitating a sense of commitment and cohesion, and highlighting and using the strengths of all involved
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.3, 4.2-4.4, 5.1-5.5	• 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 • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors and constraints into account • Recognises potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG606 Manage international marketing programs	BSBMKG606B Manage international marketing programs	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

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Assessment Requirements for BSBMKG606 Manage international marketing programs

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:

- document and present
  - international marketing objectives
  - selected marketing approach
  - creation of operational structure
- effectively manage international marketing activities
- monitor and evaluate international marketing performance, and make any necessary adjustments as required
- formulate suggestions on how marketing activities could be affected in future.

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 Australian and international standards, models policies and guidelines, including those covering:
  - environmental matters
  - human rights
  - labour relations
  - packaging
  - risk management
  - electronic commerce
- identify and explain key provisions of relevant legislation and codes of practice affecting aspects of marketing operations

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- explain the role of the Organisation for Economic Co-operation and Development (OECD)
- identify and describe key features of the country or countries being considered for market entry or penetration, including:
  - cross-cultural communication and negotiation styles
  - global and country specific economic, social and industry directions, trends, practices and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- organisational strategic and marketing plans, 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

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BSBMKG607 Manage market research

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 prepare for, manage and evaluate market research projects across an organisation.

It applies to senior marketing professionals who are 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

Business Development – Marketing

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. Prepare market research plans for implementation	1.1 Determine research policies and procedures 1.2 Develop or commission and review market research project plan and detailed work plans to point of finalisation 1.3 Execute processes to obtain required resources to implement market research project plan and work plans
2. Engage external consultants or service	2.1 Identify requirements for external consultants from market research project plan

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ELEMENT	PERFORMANCE CRITERIA
providers	2.2 Specify goods and services required to implement plans, and detail criteria for selection 2.3 Identify, evaluate and select potential consultants or other providers of required goods and services 2.4 Contract selected consultants or providers of goods and services
3. Manage market research activity	3.1 Monitor work plan activity to ensure adherence to market research project plan and work plans, and consistency with organisational market research policy and procedures 3.2 Manage external consultants or service providers to ensure performance is in line with expectations and contractual requirements
4. Evaluate research processes and findings	4.1 Confirm validity of information and data obtained by market research 4.2 Review relevance and usefulness of findings against research objectives outlined in market research project plan 4.3 Assess performance of project against all relevant elements of market research project plan and work plans 4.4 Measure stakeholder satisfaction with research process and findings 4.5 Prepare reports for future improvements to research process 4.6 Implement revised policy and practices in accordance with 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.3, 3.1, 4.1	• Accesses complex information from a range of sources and accurately analyses data relevant to marketing activities
Writing	1.2, 2.2, 2.4, 4.5	• Prepares a range of workplace documentation, using clear language and required format, to convey priorities and critical strategic information

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Oral Communication	2.4, 3.2	• Actively participates in verbal exchanges using suitable language and non-verbal features • Uses active listening and questioning techniques to confirm understanding
Numeracy	4.4	• Measures and analyses complex numeric information during evaluation process
Navigate the world of work	1.1, 3.1, 3.2, 4.6	• Understands and adheres to organisational policies and objectives • Is highly autonomous, taking responsibility and ownership for most or all aspects of own work
Interact with others	2.4, 3.2	• 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	1.2, 1.3, 2.1-2.3, 4.1-4.3	• Uses logical planning processes, and an increasingly intuitive understanding of context, to gather relevant information • Systematically analyses and evaluates information to assess performance and identify opportunities for improvement • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account • Recognises potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG607 Manage market research	BSBMKG607B Manage market research	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

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Assessment Requirements for BSBMKG607 Manage market research

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:

- prepare a market research plan
- develop specifications for research components, outsourced to external consultants as appropriate
- manage market research activities in accordance with organisational market research policy and procedures
- evaluate research processes and findings against relevant market research project plan and work plans
- prepare and present a report on market research findings.

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 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
  - design of samples
  - development and application of hypotheses
  - role of research in enterprise development
  - use of survey instruments
- compare and contrast project management principles and practices, including:
  - consultation and stakeholder involvement
  - development of policies and procedures

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  - methods of action to ensure performance
  - monitoring of timelines, budgets and other implementation plans
  - organisational procedures for engagement of consultants
- provide an overview of key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- discuss the impact of economic, social and industry directions, trends, and practices on marketing functions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- office equipment and resources
- previous market research plans and exemplars of market research project specifications
- 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

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BSBMKG608 Develop organisational marketing objectives

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 a strategic analysis to develop organisational marketing objectives. This involves reviewing the organisation's internal and external environments, evaluating past and current marketing performance, and exploring and evaluating new marketing opportunities.

It applies to senior marketing professionals who are 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 strategies to achieve overall business objectives.

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

Business Development – Marketing

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Identify strategic direction	1.1 Confirm organisation's mission, vision, purpose and values from current organisational materials or from owners, directors or senior management 1.2 Analyse strategic organisational documents to identify organisational directions and targets 1.3 Complete a situational analysis identifying factors impacting the direction and performance of the business 1.4 Identify legal and ethical requirements for the organisation 1.5 Document and confirm strategic direction of the organisation with owners, directors or senior management, and identify its impact on marketing activities
2. Review marketing performance	2.1 Evaluate effectiveness of previous marketing and positioning strategies to identify lessons learned 2.2 Analyse current key products or services and major markets for strengths, weaknesses, opportunities and threats 2.3 Evaluate previous marketing opportunities captured by the organisation, and examine and document their profitability 2.4 Evaluate marketing performance against previous objectives, targets to identify critical success factors, and areas for improvement
3. Scope marketing opportunities	3.1 Identify and analyse marketing opportunities for viability and likely contribution to the business 3.2 Use an assessment of external factors, costs, benefits, risks and opportunities to determine scope of each marketing opportunity 3.3 Analyse opportunities for likely fit with organisational goals and capabilities 3.4 Evaluate each opportunity to determine its likely impact on current business and customer base
4. Formulate marketing objectives	4.1 Develop objectives in consultation with key internal stakeholders that are attainable and measurable, and that identify nature and extent of what is to be achieved 4.2 Ensure objectives are consistent with forecast needs of the business and market 4.3 Ensure objectives are compatible with the organisation's projected capabilities, resources and financial position 4.4 Ensure objectives are compatible with the organisation's direction and purpose, and meet legal and ethical requirements

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ELEMENT	PERFORMANCE CRITERIA
	4.5 Formulate long-term strategic objectives and related key performance indicators by product or service, market segment and overall 4.6 Develop a risk management strategy to identify risks and manage contingencies, and to ensure marketing objectives are met in accordance with overall organisational requirements 4.7 Document marketing objectives

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, 2.1-2.4, 3.1-3.3, 4.3, 4.4, 4.6	• Accesses, analyses and evaluates information from a range of sources relating to the marketing process
Writing	1.3, 1.5, 2.3, 4.1, 4.5-4.7	• 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	1.1, 1.5, 4.1	• 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	1.2, 2.2, 2.3, 3.2	• Analyses complex numerical information on trend data, targets and budgets
Navigate the world of work	1.1, 1.2, 1.4, 3.3, 4.4, 4.6	• Works autonomously making high-level decisions to ensure organisational objectives and regulatory requirements are met • Understands own legal and ethical rights and responsibilities
Interact with others	1.1, 1.5, 4.1	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and how • Fosters a collaborative culture within own sphere of

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		influence, facilitating a sense of commitment to shared goals
Get the work done	1.3, 2.1-2.4, 3.1-3.4, 4.2, 4.3, 4.5, 4.6	• Uses logical planning processes, and an increasingly intuitive understanding of context, to extract relevant details when conducting strategic analysis • Systematically analyses information to formulate and evaluate alternative strategies • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG608 Develop organisational marketing objectives	BSBMKG608A Develop organisational marketing objectives	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

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Assessment Requirements for BSBMKG608 Develop organisational marketing objectives

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 marketing objectives for an organisation including:
  - undertaking strategic analysis reviewing current marketing performance
  - formulating short and long-term marketing objectives
- develop a marketing risk management strategy.

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:

- summarise financial management techniques
- identify and provide overview of key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- analyse organisational structure, policies, procedures, products or services and overall strategic plans of an organisation
- discuss principles and concepts of marketing and evaluation methodologies
- compare and contrast strategic, operational and tactical analysis techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- examples of previous marketing strategy, analyses and plans
- office equipment and resources

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- relevant legislation, regulations, standards and codes
- 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

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BSBMKG609 Develop a marketing plan

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 research, develop and present a marketing plan for an organisation.

It 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

Business Development – Marketing

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. Devise marketing strategies	1.1 Evaluate marketing opportunity options that address organisational objectives and evaluate their risks and returns in the selection process 1.2 Develop marketing strategies that address strengths and

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ELEMENT	PERFORMANCE CRITERIA
	opportunities within the organisation's projected capabilities and resources 1.3 Develop strategies which increase resources or organisational expertise where gaps exist between current capability and marketing objectives 1.4 Develop feasible marketing strategies and communicate reasons that justifies their selection 1.5 Ensure strategies align with organisation's strategic direction 1.6 Develop a marketing performance review strategy, incorporating appropriate marketing metrics to review the organisational performance against marketing objectives
2. Plan marketing tactics	2.1 Detail tactics to implement each marketing strategy in terms of scheduling, costing, accountabilities and persons responsible 2.2 Identify coordination and monitoring mechanisms for scheduled activities 2.3 Ensure tactics are achievable within organisation's projected capabilities and budget 2.4 Ensure tactics meet legal and ethical requirements 2.5 Ensure tactics provide for ongoing review of performance against objectives and budgets and allow marketing targets to be adjusted if necessary
3. Prepare and present a marketing plan	3.1 Ensure marketing plan meets organisational, as well as marketing, objectives and incorporates marketing approaches and a strategic marketing mix 3.2 Ensure marketing plan contains a rationale for objectives and information that supports the choice of strategies and tactics 3.3 Present marketing plan for approval in the required format and timeframe 3.4 Adjust marketing plan in response to feedback from key stakeholders and disseminate for implementation within the required timeframe

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.5, 1.6, 2.4, 2.5, 3.4	• Accesses information from a range of sources and accurately analyses and evaluates complex information relating to the marketing process
Writing	1.4, 1.6, 2.1, 3.3, 3.4	• 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	1.4, 3.3	• 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	2.1, 3.3	• Analyses and manages complex information relating to timelines, targets and budgets
Navigate the world of work	1.1, 1.5, 2.4, 3.1	• Works autonomously making high level decisions to ensure organisational objectives and regulatory requirements are met • Understands own legal and ethical rights and responsibilities
Interact with others	1.4, 3.3, 3.4	• Selects and uses appropriate conventions and protocols when communicating with diverse internal and external stakeholders to seek feedback or share information • Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals
Get the work done	1.1, 1.2, 1.3, 1.4, 1.6, 2.1, 2.2, 2.3, 2.5, 3.1, 3.2, 3.4	• Accepts responsibility for planning and sequencing complex tasks and workload to meet timelines • Uses problem-solving processes to identify key information and issues, evaluate alternative strategies, anticipate consequences and consider implementation issues and contingencies

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG609	BSBMKG609A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
Develop a marketing plan	Develop a marketing plan	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

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Assessment Requirements for BSBMKG609 Develop a marketing plan

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 organisational objectives and:

- devise, document and present a marketing plan including:
  - evaluation of marketing opportunity options
  - marketing strategies that utilise existing strengths and opportunities and develop resources and expertise as needed to meet objectives
  - marketing tactics that are legal, ethical, achievable and can be reviewed
  - costs, scheduling, responsibilities and accountabilities for tactics
  - strategic use of marketing approaches and marketing mix
  - rationale for objectives and chosen strategies and tactics
- adjust marketing plan in response to feedback from key stakeholders and disseminate for implementation.

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:

- summarise organisational structure, products and services and overall strategic and marketing objectives
- outline common marketing opportunity options including:
  - strategic alliances and cooperative business models
  - new products or services to target specific markets
  - greater market penetration with existing products or services
  - take-overs
  - new businesses and franchising
  - other options relevant to the organisation

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- outline common marketing strategies and marketing approaches
- explain processes to ensure marketing strategies, approaches and marketing mix align to organisation's objectives and are legal, ethical and achievable
- outline the legislative and regulatory context of the organisation as relevant to the marketing plan.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBMKG610 Develop, implement and monitor a marketing campaign

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 design marketing campaigns, to implement campaigns and to analyse success of a campaign.

It applies to individuals who possess a sound theoretical knowledge base and who support enterprise or client marketing interests by undertaking a unique set of resourcing, planning and implementation activities.

Depending on size and structure of the organisation, this role generally applies to a person with managerial responsibility, or specialist staff such as a campaign or operations manager.

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

Unit Sector

Business Development – Marketing

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. Design campaign	1.1 Identify critical campaign design features from business needs and objectives 1.2 Develop campaign objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify required campaign resources 1.4 Establish appropriate organisational, team and individual targets 1.5 Develop campaign procedures for all relevant parties 1.6 Confirm campaign design by consulting with stakeholders 1.7 Identify technical requirements to support campaign 1.8 Ensure campaign design complies with relevant legislation and regulatory codes
2. Implement campaign and monitor outcomes	2.1 Use project management tools effectively 2.2 Establish real-time campaign monitoring and reporting 2.3 Accurately analyse campaign results at regular intervals 2.4 Conduct effective campaign debriefing with staff and key stakeholders
3. Analyse fulfilment processes	3.1 Map existing fulfilment processes 3.2 Collect comprehensive data on campaign fulfilment performance 3.3 Conduct effective process improvement analysis 3.4 Establish appropriate new processes or standards 3.5 Specify and establish an appropriate tracking mechanism
4. Present campaign results to relevant business units	4.1 Conduct an effective written and oral presentation 4.2 Focus on critical aspects of campaign in the presentation 4.3 Clearly communicate required action to other parties 4.4 Communicate and resolve campaign process concerns and issues
5. Prepare campaign cost–benefit analysis	5.1 Collect relevant campaign data 5.2 Accurately calculate cost of calls and other transactions 5.3 Accurately assess immediate and longer-term financial gains of campaign 5.4 Communicate appropriate performance and financial results to relevant parties

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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, 1.8, 2.3, 3.2, 3.3, 5.1	• Identifies and analyses complex text to determine legislative, regulatory and all related business requirements
Writing	1.2, 1.4, 1.5, 2.2, 3.1-3.5, 4.1-4.4, 5.4	• Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.6, 2.4, 4.1-4.4, 5.4	• Uses listening and questioning to confirm understanding of requirements • Participates in a verbal exchange of ideas/solutions and uses appropriate, detailed and clear language to address key personnel and to disseminate information
Numeracy	1.3, 5.2-5.4	• Uses mathematical skills to manage budgetary resources, analyse data and determine financial gains
Navigate the world of work	1.1, 1.8	• Understands and adheres to organisational policies and objectives and legal requirements • Is highly autonomous, taking responsibility and ownership for most or all aspects of own work
Interact with others	1.6, 2.4, 4.1- 4.4, 5.4	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and how • Fosters a collaborative culture within own sphere of influence, facilitating a sense of trust, commitment and cohesion
Get the work done	1.1-1.5, 1.7, 2.1, 2.2, 3.1-3.5, 4.4, 5.1, 5.3	• Takes responsibility for planning and scheduling tasks required to design and implement campaigns • Uses formal processes to identify key information and issues, evaluate alternative strategies, anticipate consequences and consider implementation issues and contingencies • Takes responsibility for high-impact decisions in complex situations involving many variables and constraints • Uses digital tools to access and organise complex data and analyse multiple sources of information for strategic purposes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG610 Develop, implement and monitor a marketing campaign	BSBMKG610A Develop, implement and monitor a marketing campaign	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

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Assessment Requirements for BSBMKG610 Develop, implement and monitor a marketing campaign

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:

- design, implement, control, monitor and review a marketing campaign
- apply relevant legislation, regulatory and organisational requirements 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 business objectives and requirements
- outline campaign design and evaluation principles
- summarise competitor activity and products/services
- identify customer contact technology and databases
- outline legislation, regulatory and organisational requirements
- explain methods of operational and business planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBMKG611 Manage measurement of marketing effectiveness

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 strategy measuring the effectiveness of marketing activity.

It applies to individuals who possess a sound theoretical knowledge base and who are primarily responsible for using a range of metrics to gauge success of marketing interests.

Depending on size and structure of the organisation, this role generally applies to a person with managerial responsibility.

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

Unit Sector

Business Development – Marketing

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. Prepare for implementation of strategy to measure marketing effectiveness	1.1 Review current marketing strategies and marketing plans, and research range of metrics available to measure effectiveness of relevant marketing processes and functions 1.2 Analyse effectiveness of current marketing metrics used by the organisation in each key marketing operation

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Critically analyse how existing marketing metrics link to strategy, and opportunities to improve links 1.4 Plan to address any issues with use of marketing metrics within the organisation 1.5 Design criteria for retaining existing marketing metrics, and for selecting new manageable and cost-effective metrics 1.6 Gain approval for design or redesign of strategy from senior management
2. Design strategy to measure marketing effectiveness	2.1 Set objectives for measurement and evaluation of marketing effectiveness 2.2 Select methods to measure marketing performance for each marketing process or function, tailored to the organisation's brand or unique positioning 2.3 Calculate costs of gathering and analysing data with assistance of relevant financial experts 2.4 Design and record implementation strategy for measuring and analysing marketing performance, or make recommendations for improving current strategy
3. Manage, implement and evaluate strategy to measure marketing effectiveness	3.1 Design and implement appropriate communication and training strategy, so marketing and other relevant personnel fully understand their role in measuring marketing effectiveness 3.2 Supervise design and implementation of specific metrics 3.3 Plan and monitor work activity to ensure adherence to strategy for measurement of marketing effectiveness 3.4 Design process to review and evaluate marketing metrics on a regular basis, and if organisational strategy changes

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	• Identifies and analyses complex data to determine business requirements

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Writing	1.5, 1.6, 2.1-2.4, 3.1, 3.4	• Prepares a range of workplace documentation using clear and accurate language, logical formatting and organisational conventions to convey priorities and critical strategic information
Oral Communication	1.6, 2.3, 3.2	• Actively participates in verbal exchanges using suitable language and non-verbal features • Uses active listening and questioning to confirm understanding
Numeracy	1.5, 2.3, 3.2	• Uses mathematical skills to analyse data, design and review metrics, and evaluate cost-efficacy of business activities
Navigate the world of work	1.1, 1.2, 1.4, 3.4	• Monitors adherence to organisational policies and objectives • Is highly autonomous, taking responsibility and ownership for most or all aspects of own work, intuitively recognising and managing factors that may affect achievement of goals
Interact with others	1.6, 2.3, 3.1	• Recognises 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 to achieve joint outcomes, playing an active role in facilitating group interaction
Get the work done	1.1-1.5, 2.1, 2.2, 2.4, 3.1-3.4	• Takes responsibility for planning and scheduling work activities and tasks required to measure marketing effectiveness • Uses problem-solving processes to identify key information and issues, evaluate alternative strategies, anticipate consequences and consider solutions to implementation issues • Takes responsibility for high impact decisions in complex situations involving many variables and constraints • Uses digital tools to access and organise complex data and analyse multiple sources of information for strategic purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG611 Manage measurement of marketing effectiveness	BSBMKG611A Manage measurement of marketing effectiveness	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

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Assessment Requirements for BSBMKG611 Manage measurement of marketing effectiveness

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:

- design a strategy for measuring marketing performance, including:
  - objectives
  - metrics
  - costs
  - implementation strategy
  - evaluation strategy
- implement specific, chosen metrics as required by strategy
- create training program for relevant personnel, including their role in measuring marketing effectiveness.

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 factors to consider when designing and implementing a communication and training strategy
- describe the range of marketing functions within an organisation
- explain a range of marketing metrics and their usefulness in measuring key marketing operations
- summarise relationship between marketing metrics and the need for marketing directors, chief financial officers, chief executive officers and board members to be able to monitor marketing performance.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – marketing field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBPMG409 Apply project scope management techniques

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 contribute to the control of a project's scope by assisting with identifying its objectives, deliverables, constraints, assumptions and outcomes; and by applying controls once the project has commenced.

It 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

Management and Leadership – Project Management

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. Contribute to defining project scope	1.1 Review project initiation documentation and assist in identifying project objectives and requirements 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 Assist in obtaining agreement to scope from relevant project

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ELEMENT	PERFORMANCE CRITERIA
	authority
2. Apply project scope controls	2.1 Undertake work according to agreed project scope management plan and by using established change control procedures and performance measurement procedures 2.2 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 Measure progress to determine potential, perceived and actual scope changes 3.2 Appropriately report scope changes 3.3 Assist in review of project outcomes to determine effectiveness of initial and subsequent scope management approaches

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	• Interprets and analyses complex texts
Writing	1.4, 1.5, 3.2	• Develops and amends plans and associated documentation using appropriate organisational formats and vocabulary
Oral Communication	1.2-1.5, 2.2	• Interacts effectively in verbal exchanges, using clear language to convey information, and active listening and questioning to clarify understanding
Numeracy	1.3, 3.1	• Selects and applies a range of mathematical and problem-solving strategies to develop timelines and monitor progress
Interact with others	1.2-1.5, 2.2	• Uses appropriate communication practices in a range of work contexts • Collaborates and cooperates with others to achieve shared goals
Get the work done	2.1, 3.1, 3.2, 3.3	• Plans and organises tasks required to monitor and report on project implementation • Analyses outcomes to identify future

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		improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG409 Apply project scope management techniques	BSBPMG409A Apply project scope-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

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Assessment Requirements for BSBPMG409 Apply project scope management techniques

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 delineating and controlling project scope
- record project scope management plan
- interpret and follow project initiation documentation for purposes of documenting project scope.

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:

- list components of a project scope management plan
- identify and describe factors likely to impact project scope
- outline formal change-control processes
- identify and discuss methods for measuring work outcomes and progress against plans
- identify and discuss methods for segmenting and documenting a work breakdown structure
- explain procedures for reporting a change in scope
- describe types of project initiation documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation which includes information about project scope
- case studies and, where possible, real situations.

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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

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BSBPMG410 Apply project time management techniques

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 assist with project scheduling activities, apply and monitor the agreed project schedule, and evaluate the effectiveness of time management for the project.

It 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

Management and Leadership – Project Management

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. Assist in developing project schedule	1.1 Contribute to developing work breakdown structure with sufficient detail to enable effective planning and control 1.2 Contribute to estimating duration and effort, sequence and dependencies of tasks to achieve project deliverables 1.3 Assist in using 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

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ELEMENT	PERFORMANCE CRITERIA
	communicating the schedule to stakeholders
2. Maintain project schedule	2.1 Use techniques to measure, record and report progress of activities in relation to agreed schedule 2.2 Record baseline variance between actual and planned progress 2.3 Contribute to forecasting impact of change on the schedule and 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 Assist in review of project performance to determine effectiveness of time management 3.2 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	Performance Criteria	Description
Reading	1.1, 1.3, 3.1	• Interprets project documentation to determine scheduling requirements and review performance
Writing	1.1, 1.3, 2.1, 2.2, 2.4, 3.2	• Documents project activities using structure, layout, vocabulary, and conventions appropriate to context
Oral Communication	1.4, 3.1	• 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	1.2, 1.3, 2.1	• Selects and applies a range of mathematical strategies to determine resources and measure work output against a predetermined timeline
Interact with others	1.4, 3.1	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts
Get the work done	1.1, 1.3, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2	• Plans and implements tasks required to monitor implementation of plans

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		• Reviews and reflects on outcomes to identify whether objectives were met • Uses digital tools to enter, analyse and present data and information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG410 Apply project time-management techniques	BSBPMG410A Apply project time-management techniques	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

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Assessment Requirements for BSBPMG410 Apply project time management techniques

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:

- create a project schedule showing tasks, deliverable milestones, sequence, dependencies and time estimates
- apply time-management techniques in a project
- use tools and techniques to maintain, monitor and update a project schedule.

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 implications of time management for project resources, costs and risks
- describe methods for estimating task duration and resource requirements
- identify tools and techniques for managing project time and their particular applications
- explain techniques used to measure, record and report progress of activities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation relevant to project management
- planning tools
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBPMG411 Apply project quality management techniques

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 enhance project outcomes by contributing to quality planning, applying quality policies and procedures, and contributing to continuous improvement in projects.

It applies to individuals who are a 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

Management and Leadership – Project Management

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. 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 Source information to locate and interpret quality policy and procedures 1.4 Contribute to developing quality requirements in the project plan and processes

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ELEMENT	PERFORMANCE CRITERIA
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 methodologies to project processes according to organisational policy 2.3 Maintain quality-control records and audit documentation according to agreed procedures 2.4 Determine and maintain compliance records against agreed quality requirements 2.5 Report shortfalls in quality outcomes to others to enable appropriate action to be initiated
3. Contribute to project continuous improvement process	3.1 Participate in ongoing review of project outcomes to determine effectiveness of quality management activities 3.2 Contribute to stakeholder satisfaction analysis to ensure expectations have been met 3.3 Report quality management issues and responses to others 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	Performance Criteria	Description
Reading	1.1-1.3, 2.2-2.4, 3.2	• Reviews and evaluates project documentation and stakeholder feedback
Writing	1.4, 2.2-2.4, 3.3	• 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	1.1, 1.2, 1.4, 2.5, 3.1, 3.3	• Uses clear language to share and review information with others
Numeracy	1.2, 3.2	• Extracts and evaluates mathematical information embedded in a range of tasks and texts
Navigate the world of work	1.3, 2.2-2.4	• Takes personal responsibility for adherence to policies, procedures and legislative requirements

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Interact with others	1.1, 1.2, 1.4, 2.5, 3.1, 3.3	• Selects appropriate communication practices in a range of work contexts • Collaborates and cooperates with others to achieve shared goals
Get the work done	1.1, 1.4, 2.1, 2.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG411 Apply project quality management techniques	BSBPMG411A Apply project quality-management techniques	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

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Assessment Requirements for BSBPMG411 Apply project quality management techniques

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 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.

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 implementation of quality-assurance processes and requirements
- discuss implementation of quality-control processes and requirements
- describe quality criteria relevant to industry
- explain application of quality management tools and methodologies relevant to industry and organisation
- describe and explain quality standards and their place in the project life cycle.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation used for quality management purposes
- project records

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- 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

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BSBPMG412 Apply project cost management techniques

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 assist in producing a project budget, to monitor project expenditure and contribute to cost finalisation processes.

It 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

Management and Leadership – Project Management

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. Assist in developing project budget	1.1 Implement cost-estimating methods against duration/effort and resource requirements 1.2 Determine estimated costs for tasks and activities and confirm degree of accuracy with relevant stakeholders 1.3 Communicate cost estimates, where required, to others to contribute to project budget and cash flow management 1.4 Contribute to developing cost management strategies and processes, and providing financial authorisation within delegated authority

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ELEMENT	PERFORMANCE CRITERIA
2. Monitor project costs	2.1 Monitor income and expenditure against project budget baseline at predetermined intervals 2.2 Identify and report variations in budget using established project cost methods, techniques and tools 2.3 Implement action and report progress to ensure cost objectives remain achievable throughout project life cycle
3. Contribute to cost-finalisation process	3.1 Assist in finalisation and transfer of financial assets, liabilities and records to relevant parties 3.2 Assist in review of project outcomes through use of project cost records to determine effectiveness of cost management processes 3.3 Document cost management lessons learned 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	Performance Criteria	Description
Reading	1.2, 2.4, 3.2	• Applies appropriate strategies to construct meaning from complex texts
Writing	2.2, 2.3, 3.1, 3.2, 3.3	• Prepares reports and reviews matching writing style to purpose and audience
Oral Communication	1.2, 1.3, 3.1, 3.2	• Uses clear language and appropriate features to convey and discuss cost management issues • Uses active listening and questioning to check understanding
Numeracy	1.1, 1.2, 1.4, 2.1-2.3, 3.1, 3.2	• 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
Navigate the world of work	1.4, 2.3	• Recognises and follows protocols that must be respected and maintained
Interact with	1.2, 1.3, 3.1, 3.2	• Uses appropriate communication practices in a range

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others		of work contexts • Collaborates and cooperates with others to achieve shared goals
Get the work done	1.2, 2.1, 2.2, 3.1, 3.2	• Plans, organises and implements tasks required to achieve required outcomes • Reflects on outcomes to identify future improvement opportunities • Utilises features of digital systems and y to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG412 Apply project cost management techniques	BSBPMG412A Apply project cost-management techniques	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

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Assessment Requirements for BSBPMG412 Apply project cost management techniques

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:

- produce a project budget
- closely monitor project expenditure
- finalise project costs and make recommendations for possible improvements to future projects.

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 budgeting processes and their relationship to project life cycle
- explain how to apply cost management tools and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project management budgets and related documentation
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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BSBPMG413 Apply project human resources management approaches

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 assist with aspects of human resources management of a project. It involves establishing human resource requirements, identifying the learning and development needs of people working on the project, facilitating these needs being met, and resolving conflict in the team.

It 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

Management and Leadership – Project Management

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. Assist in determining human resource requirements	1.1 Analyse work breakdown structure to determine human resource requirements 1.2 Prepare a skills analysis of project personnel against project task requirements 1.3 Assist in assigning responsibilities for achieving project deliverables

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ELEMENT	PERFORMANCE CRITERIA
2. Contribute to establishing and maintaining productive team relationships	2.1 Actively seek views and opinions of team members during task planning and implementation 2.2 Promote cooperation and effective activities, goals and relationships within team 2.3 Communicate with others using styles and methods appropriate to organisational standards, group expectations and desired outcomes 2.4 Communicate information and ideas to others in a logical, concise and understandable manner 2.5 Regularly seek feedback on nature and quality of work relationships, and use feedback as basis for own improvement and development
3. Assist with human resource monitoring	3.1 Monitor work of project personnel against assigned roles and responsibilities within delegated authority levels 3.2 Monitor and control actual effort against project plan 3.3 Review skill levels against allocated tasks and recommend solutions, where required, to others 3.4 Advise others within delegated authority when assigned responsibilities are not met by project personnel 3.5 Undertake work in a multi-disciplinary environment according to established human resource management practices, plans, guidelines and procedures 3.6 Resolve conflict within delegated authority according to agreed dispute-resolution processes 3.7 Assist in offering human resource development opportunities to individuals with skill gaps
4. Contribute to evaluating human resource practices	4.1 Contribute to assessing effectiveness of project human resources management 4.2 Document lessons learned to support continuous improvement processes

Foundation Skills

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

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Skill	Performance Criteria	Description
Learning	2.5	• Actively seeks feedback from others as a strategy to improve own skills or knowledge
Reading	1.1-1.3, 3.2, 3.3, 3.5	• Identifies and interprets information from organisational documentation
Writing	1.2, 2.3, 2.4, 3.4, 4.1, 4.2	• Develops a range of documents using structure and vocabulary appropriate to audience, context and purpose
Oral Communication	2.1-2.5, 3.3, 3.4, 3.6, 3.7	• 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
Navigate the world of work	1.3, 3.4	• Understands responsibilities associated with own role
Interact with others	2.1-2.5, 3.3, 3.4, 3.6, 3.7	• Uses accepted communication practices and protocols when sharing or providing information • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Uses a range of strategies to facilitate solutions to conflicts
Get the work done	1.3, 3.1-3.3, 3.5, 3.6, 4.1	• Plans and implements required tasks, monitors actions against requirements, and adjusts plans and resources to cope with contingencies • Reflects on outcomes to identify opportunities for future improvement

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG413 Apply project human resources management approaches	BSBPMG413A Apply project human resources management approaches	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBPMG413 Apply project human resources management approaches

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:

- produce work breakdown structures in human resource project planning
- 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.

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 alternative project personnel engagement options
- explain job design principles and work breakdown structures
- describe learning and development approaches that can be incorporated into project life cycle
- list methods for skills analysis
- identify and describe project roles, responsibilities and reporting requirements for human resources.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations.

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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

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BSBPMG414 Apply project information management and communications techniques

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 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.

It 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

Management and Leadership – Project Management

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. Contribute to communications planning	1.1 Identify, source and contribute relevant information requirements to initial project documentation 1.2 Contribute to developing and implementing the project communications plan and communications networks
2. Conduct information-management	2.1 Act on and process project information according to agreed procedures as directed, to aid decision-making processes

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ELEMENT	PERFORMANCE CRITERIA
activities	throughout project life cycle 2.2 Maintain information to ensure data is secure and auditable
3. Communicate project information	3.1 Communicate with clients and other stakeholders during project using agreed networks, processes and procedures to ensure flow of necessary information 3.2 Ensure reports are prepared and released according to authorisation, or produced for release by others 3.3 Seek information and advice from appropriate project authorities as required
4. Contribute to assessing effectiveness of communication	4.1 Assist in ongoing review of project outcomes to determine effectiveness of communications-management activities 4.2 Report communications-management issues and responses to higher project authorities for application of lessons learned 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	Performance Criteria	Description
Reading	1.1	• Interprets textual information from a range of sources and determines how content may be applied
Writing	1.2, 2.2, 3.1, 3.2, 4.2	• Develops plans and reports using structure and vocabulary appropriate to audience, context and purpose • Maintains records according to organisational requirements
Oral Communication	1.2, 3.1, 3.3, 4.2	• Participates in a 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
Interact with others	1.2, 3.1, 3.3, 4.2	• Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how

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		• Collaborates and cooperates with others to achieve shared goals
Get the work done	1.1, 2.1, 2.2, 3.1, 3.2, 4.1	• Sequences and schedules required tasks, monitors implementation and manages relevant communication • Reflects on outcomes to identify opportunities for future improvements • Manages information storage, retrieval and sharing, according to security requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG414 Apply project information management and communications techniques	BSBPMG414A Apply project information management and communications techniques	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

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Assessment Requirements for BSBPMG414 Apply project information management and communications techniques

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:

- lead an effective team in planning and implementing all necessary communications for a workplace project
- evaluate and review project communication outcomes and make recommendations for future 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:

- summarise models and methods of communications management in context of project life cycle and other project management functions
- explain importance of managing risk by treating information securely
- outline methods of reviewing outcomes
- identify organisational policies and procedures relevant to this role in a specific context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- examples of project management documentation for communications-management purposes
- documentation about project team involvement in communications activities
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBPMG415 Apply project risk management techniques

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 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.

It 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

Management and Leadership – Project Management

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. Assist with risk analysis and planning	1.1 Contribute to identifying and prioritising potential risks throughout the project life cycle, using established risk-analysis methods, techniques and tools 1.2 Contribute to developing risk management strategies and risk management plans according to established guidelines 1.3 Contribute to developing and implementing risk-reporting mechanisms
2. Perform risk-control	2.1 Monitor risks according to agreed project and risk management

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ELEMENT	PERFORMANCE CRITERIA
activities	plans and advise project manager of changing circumstances 2.2 Regularly review current and proposed activities to identify potential and actual risks and opportunities 2.3 Contribute to implementing agreed risk management approaches and amending plans to reflect the changing environment 2.4 Contribute to corrective action on risks according to risk management plan and delegated authority 2.5 Contribute to review of contingency plans on an ongoing basis and, where required, ensure tasks allocated to individuals and/or team are clarified with the project manager before implementation 2.6 Apply and monitor risk-contingency measures according to risk management plan 2.7 Identify and report opportunities in the same way as risks
3. Contribute to assessing risk management outcomes	3.1 Contribute to ongoing review of project outcomes to determine effectiveness of risk management activities by accessing project risk records and other available information 3.2 Report risk management issues and responses to others for lessons learned or 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	Performance Criteria	Description
Reading	2.4, 2.6, 3.1	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.2, 1.3, 2.7, 3.2	• Documents results of analyses using required organisational formats • Develops project documentations using structure and vocabulary appropriate to audience, context and purpose
Oral communication	1.1, 1.2, 1.3, 2.1, 2.5, 2.7, 3.2	• 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

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		elicit views and opinions of others
Navigate the world of work	2.4	• Understands responsibilities of own role in terms of its contribution to broader goals of work environment
Interact with others	1.1, 1.2, 1.3, 2.1, 2.5, 2.7, 3.2	• Selects appropriate communication protocols in a range of work contexts • Collaborates and cooperates with others to achieve shared goals
Get the work done	2.1-2.6, 3.1	• Sequences and schedules required tasks and activities and manages relevant communication • Reflects on outcomes to identify opportunities for future improvement • Identifies 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**
BSBPMG415 Apply project risk management techniques	BSBPMG415A Apply project risk-management techniques	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

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Assessment Requirements for BSBPMG415 Apply project risk management techniques

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:

- assist others 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.

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 tools to help determine potential risks for a specific project
- explain strategies for managing project risks and their application in different situations
- explain the importance of risk-contingency measures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project management documentation for risk management
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBPMG416 Apply project procurement procedures

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 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.

It applies to individuals who are project practitioners working in a project support role. The individual may be operating in a large or small organisation, and applying skills in the context of enterprise projects.

The project practitioner 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

Management and Leadership – Project Management

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. Assist with procurement planning	1.1 Contribute to establishing procurement requirements to achieve project objectives 1.2 Act under delegated authority to contribute to development of

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ELEMENT	PERFORMANCE CRITERIA
	procurement-management plan 1.3 Contribute to developing procurement documentation
2. Contribute to supplier selection process	2.1 Gather and evaluate information on potential suppliers 2.2 Make recommendations to assist in selection of preferred suppliers 2.3 Contribute to establishing agreed terms and conditions with preferred suppliers 2.4 Identify and act in line with probity and project governance constraints 2.5 Assist in developing contractual documentation
3. Conduct procurement activities	3.1 Test and accept supplies to ensure they are fit for purpose in both quality and suitability 3.2 Undertake procurement activities and maintain information in line with reporting, confidentiality and audit requirements 3.3 Receive, reconcile and register supplies according to established procedures 3.4 Monitor and control suppliers according to contractual supply documentation
4. Assist in finalising procurement activities	4.1 Assist in finalising procurement agreements 4.2 Assist in review of project outcomes using available records to determine effectiveness of procurement activities 4.3 Contribute to identifying lessons learned and possible improvements to procurement management

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, 2.4, 3.2, 3.3, 3.4, 4.2	• Applies appropriate strategies to construct meaning from a variety of texts
Writing	1.1, 1.3, 2.2, 2.3,	• Develops informative project documents using vocabulary and structure appropriate to audience,

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	2.5, 3.2, 3.3, 4.1, 4.2	context and purpose • Completes project documentation using required formats and structure
Oral Communication	1.1, 1.3, 2.2, 2.3, 2.5	• Participates 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	1.3, 2.5, 3.2, 3.3	• Uses basic mathematical formula to calculate whole numbers and decimals to ensure financial accounts match purchased items
Navigate the world of work	1.2, 2.4, 3.2-3.4	• Understands responsibilities and boundaries associated with own role • Adheres to organisational policies and procedures when planning and undertaking work
Interact with others	1.1, 1.3, 2.2, 2.3, 2.5	• Uses accepted communication practices and protocols to share or provide information • Collaborates with others to achieve project outcomes
Get the work done	1.2, 2.1, 3.1, 3.2, 3.4, 4.2, 4.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG416 Apply project procurement procedures	BSBPMG416A Apply project procurement procedures	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

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Assessment Requirements for BSBPMG416 Apply project procurement procedures

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:

- 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.

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 procurement-management policy, processes and procedures
- explain the procurement documentation requirements
- describe the components of contractual documentation and the legal obligations of all parties
- explain the process used to select preferred contractors
- identify and describe project procurement-management tools and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- examples of project procurement documentation
- examples of procurement tasks and activities

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- 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

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BSBPMG417 Apply project life cycle management processes

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 assist in implementing project life cycle management processes.

It 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

Management and Leadership – Project Management

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. Assist in establishing project	1.1 Identify and clarify project initiation documentation where required 1.2 Establish relationship between the project and broader organisational strategies and goals 1.3 Assist in negotiating and documenting project objectives, outcomes and benefits 1.4 Assist in establishing the project governance structure 1.5 Assist in drafting a project charter for approval
2. Support project	2.1 Support breakdown of project objectives into achievable

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ELEMENT	PERFORMANCE CRITERIA
planning and design processes	project deliverables 2.2 Assist in identifying project stages, and key requirements for stage completion 2.3 Identify project milestones and map clearly against time and objectives 2.4 Assist in consolidating associated plans and baselines in project management plan 2.5 Support negotiation with relevant stakeholders and project authority to gain approval of project plan
3. Assist with project control and execution	3.1 Maintain and update records against project deliverables and plans at required intervals 3.2 Prepare status reports on project progress and identified issues 3.3 Assist with undertaking an impact analysis of proposed changes to the project 3.4 Maintain relevant project logs and registers accurately and regularly to assist with project audit 3.5 Update associated plans to reflect project progress against baselines and approved changes
4. Assist with project finalisation	4.1 Assist with project finalisation activities where required 4.2 Prepare project products and associated documentation for handover to client 4.3 Assist in completing financial, legal and contractual obligations where required 4.4 Contribute perspectives on project performance to assist with project review assessments

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, 2.3, 2.4, 3.1, 3.2, 3.5, 4.3	• Recognises and interprets textual information from a range of sources and determines how content may be applied to organisational requirements

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Writing	1.1-1.5, 2.3, 2.4, 3.1-3.5, 4.1-4.4	• Uses clear, industry specific terminology, and appropriate structure, to complete and update, workplace documentation • Maintains records using required vocabulary and formats
Oral Communication	1.3-1.5, 2.2, 2.4, 2.5, 3.3, 4.1, 4.4	• Participates in verbal exchanges using clear language and appropriate non-verbal features to provide relevant information • Uses active listening and questioning to elicit views and opinions of others
Numeracy	2.3, 2.4, 4.3	• Interprets mathematical information to finalise financial obligations and measure work outputs against projections
Navigate the world of work	1.2, 2.5, 4.3	• Understands own responsibilities and considers implications of these when negotiating, planning and undertaking work • Adheres to organisational policies and procedures and legislative requirements
Interact with others	1.3-1.5, 2.2, 2.4, 2.5, 3.3, 4.1, 4.3, 4.4	• Recognises 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
Get the work done	1.1, 2.1, 2.2, 2.3, 3.3, 3.4, 3.5, 4.1, 4.4	• Sequences and schedules required tasks, monitors implementation and manages relevant communication • Reflects on outcomes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG417 Apply project life cycle management processes	BSBPMG417A Apply project life cycle management processes	Updated to meet Standards for Training Packages. Minor edits to clarify meaning of Performance Criteria.	Equivalent unit

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Links

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

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Assessment Requirements for BSBPMG417 Apply project life cycle management processes

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 plan and document a project based on organisational parameters
- complete and update all relevant documentation
- examine impact that project changes could have on final outcomes
- undertake project finalisation 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:

- explain basic project governance models
- describe project finalisation and evaluation products
- identify and describe project life cycle stages, phases and structures relevant to industry and project
- explain project planning documents and their specific formats relevant to industry and context
- outline key organisational policies and procedures
- describe various types of project initiation documentation
- identify types of project logs and registers in use in this context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation, including information about life cycle processes

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- 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

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BSBPMG418 Apply project stakeholder engagement techniques

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 assist in managing stakeholder relationships during a project. It involves ensuring timely and appropriate involvement of key individuals, organisations and groups throughout the project.

It 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

Management and Leadership – Project Management

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. Assist in identifying and addressing stakeholder interests	1.1 Assist in identifying stakeholders relevant to project objectives 1.2 Segment stakeholder interests and assist in determining forms of engagement 1.3 Consider interests of stakeholders when advising on project operations 1.4 Support actions to address differing stakeholder interests where required
2. Actively participate in	2.1 Apply interpersonal skills to ensure stakeholder engagement is

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ELEMENT	PERFORMANCE CRITERIA
stakeholder engagement	effective 2.2 Conduct stakeholder engagement in line with agreed and defined project roles 2.3 Establish and clarify stakeholder behaviour expectations where required 2.4 Openly engage with stakeholder performance reviews 2.5 Recognise and address development needs and opportunities to support stakeholder engagement
3. Assist stakeholder communications	3.1 Assist in determining and documenting stakeholder communication needs 3.2 Assist in negotiating agreement on project communication method, and content and timing of stakeholder engagement 3.3 Support communication of information as planned within authority levels, identifying and addressing variances

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	• Recognises and interprets textual information to determine and adhere to objectives
Writing	1.2, 3.1	• Documents findings on communication needs using required formats and structure
Oral Communication	1.1-1.3, 2.1-2.4, 3.1-3.3	• 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
Navigate the world of work	2.2, 3.3	• Understands how own role meshes with others and contributes to broader work goals
Interact with others	1.1-1.4, 2.1-2.5, 3.1-3.3	• Recognises 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

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		activities and contributes to specific activities • Uses interpersonal skills to build rapport, negotiate agreement and maintain positive working relationships
Get the work done	1.1, 1.2, 2.2, 2.5, 3.1, 3.3	• Uses analytical skills to identify stakeholders and determine their needs • Follows pre-determined plans to achieve required outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG418 Apply project stakeholder engagement techniques	BSBPMG418A Apply project stakeholder engagement techniques	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

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Assessment Requirements for BSBPMG418 Apply project stakeholder engagement techniques

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 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
- complete all relevant 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:

- describe different types of stakeholders
- explain the different levels of stakeholder engagement on projects
- describe techniques and strategies for stakeholder engagement
- explain why the interests and expectations of stakeholders must be considered
- describe common problems leading to variances in stakeholder engagement.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation detailing stakeholder engagement
- examples of stakeholder engagement activities.

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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

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BSBPMG511 Manage project scope

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 and manage project scope. It involves obtaining project authorisation, developing a scope management plan, and managing the application of project scope controls.

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

Management and Leadership – Project Management

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. 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, negotiate and document project boundaries 2.2 Establish measurable project benefits, outcomes and outputs

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Establish a shared understanding of desired project outcomes with relevant stakeholders 2.4 Document scope management plan
3. Manage project scope control process	3.1 Implement agreed scope management procedures and processes 3.2 Manage 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	Performance Criteria	Description
Reading	1.3, 2.1, 3.1, 3.2	• Interprets and analyses information from a range of complex texts
Writing	1.1-1.3, 2.1-2.4, 3.3	• Develops project documentation and procedures using formats and language appropriate to context
Oral Communication	1.1-1.3, 2.1- 2.3, 3.3	• 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	2.2, 3.2	• Interprets numerical information to determine project timelines and measure outcomes against project scope
Navigate the world of work	1.3, 3.1, 3.2	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.1-1.3, 2.1, 2.3, 3.3	• 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
Get the work done	1.1, 2.1, 2.2, 3.1, 3.2, 3.3	• Sequences and schedules complex activities, monitors implementation and manages relevant communications • Makes a range of critical and non-critical decisions in

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		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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG511 Manage project scope	BSBPMG511A Manage project scope	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

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Assessment Requirements for BSBPMG511 Manage project scope

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:

- complete project authorisation activities
- collaborate with stakeholders to produce a scope-management plan
- implement scope-management plan according to procedures
- review and document scope-management implementation and recommend 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:

- identify components of a project scope-management plan
- describe factors likely to impact the project scope
- explain formal change-control processes
- describe methods for measuring work outcomes and progress against plans
- describe methods for segmenting and documenting a work breakdown structure
- identify and describe problem areas likely to be encountered in scope management
- explain procedures for reporting scope change
- explain project life cycle and the significance of scope management
- identify project management tools used for managing scope
- outline roles and responsibilities of project manager in relation to project planning
- identify types of project initiation documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

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- workplace documentation used to document and manage project scope
- examples of feedback from project stakeholders regarding management of project scope
- 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

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BSBPMG512 Manage project time

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 time during projects. It involves determining and implementing the project schedule, and assessing time management outcomes.

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

Management and Leadership – Project Management

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. 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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	Performance Criteria	Description
Reading	1.1, 2.1-2.4, 3.1	• Identifies, interprets and analyses textual information obtained from a range of sources
Writing	1.1, 2.1, 2.4, 2.5, 3.2	• Drafts and develops documentation required for project scheduling and reporting using appropriate formats and language
Oral Communication	1.4, 2.5	• Participates in a verbal exchanges using clear and detailed language and appropriate non-verbal features to convey expectations and advise others on progress
Numeracy	1.1, 1.2, 1.3, 1.4, 2.1-2.5	• Calculates time requirements for project scheduling • Uses basic mathematical formula to determine costs and other necessary resources
Interact with others	1.4, 2.5	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Get the work	1.1-1.4, 2.1-2.5, 3.1,	• Plans and schedules complex activities, monitors

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done	3.2	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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG512 Manage project time	BSBPMG512A Manage project time	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

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Assessment Requirements for BSBPMG512 Manage project time

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 a project schedule using project management tools and techniques
- implement, analyse and monitor a project schedule
- conduct a review of project scheduling and recommend improvements for the future.

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 estimation techniques to determine task duration and resource effort
- explain procedures for identifying critical path
- explain procedures for managing project baselines, establishment and variance
- summarise project life cycle phases and describe each phase
- explain best-practice time management methodologies, their capabilities, limitations, applications and outcomes
- summarise key tools for project scheduling
- explain work breakdown structures and application to project schedules.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to workplace documentation, including:

- examples of project schedules, reports and feedback from project stakeholders regarding time management
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBPMG513 Manage project quality

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 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.

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

Management and Leadership – Project Management

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. Determine quality requirements	1.1 Determine quality objectives and standards with input from stakeholders 1.2 Document, in a quality management plan, quality metrics for the project and product output 1.3 Select established quality management methods, techniques and tools to resolve quality issues 1.4 Distribute, discuss and support quality requirements with

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ELEMENT	PERFORMANCE CRITERIA
	project team and stakeholders 1.5 Include agreed quality requirements in the project management plan, and implement as basis for performance measurement
2. Implement quality processes	2.1 Undertake quality assurance audit of project processes for compliance with agreed plans 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 to enable accurate and timely recording of quality audit data

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, 2.2	• Interprets, analyses and assesses textual information obtained from a range of sources and determines how content may be applied to requirements
Writing	1.2, 1.5, 2.1, 2.4	• Develops and documents quality requirements for project plan • Records results of quality audits according to organisational requirements
Oral Communication	1.1, 1.4	• Participates in a 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	1.1, 1.2, 2.2, 2.3	• Interprets information to determine measurable objectives • Interprets numerical information to measure outcomes against objectives
Navigate the world of work	1.1	• Takes responsibility for identifying and following policies, procedures and standards

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Interact with others	1.1, 1.4	• Selects and uses appropriate communication practices in a range of work contexts • Collaborates with others to foster shared understanding of quality requirements
Get the work done	1.3, 1.5, 2.1, 2.2-2.4	• Sequences and schedules complex activities, 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG513 Manage project quality	BSBPMG513A Manage project quality	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

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Assessment Requirements for BSBPMG513 Manage project quality

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 decide a project's quality requirements
- document a quality-management plan
- implement quality control and assurance processes for a defined project using a range of tools and methodologies
- review outcomes and recommend process 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:

- explain quality management theory
- explain relevant standards that apply in the organisation
- describe quality assurance and control techniques, key tools and methodologies
- describe roles and responsibilities of quality management personnel
- explain methods for managing continuous improvement.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation including quality criteria, evidence of quality monitoring and improvement practices
- case studies and, where possible, real situations
- Interaction with others.

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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

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BSBPMG514 Manage project cost

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, analyse and refine project costs to produce a budget, and to use this budget as the principal mechanism to control project cost.

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

Management and Leadership – Project Management

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. Determine project costs	1.1 Determine resource requirements for individual tasks identified in the work breakdown structure, with input from stakeholders and guidance from others 1.2 Estimate project costs to enable project budget to be prepared within agreed tolerances 1.3 Develop a project budget 1.4 Develop a cost-management plan, within delegated authority, to ensure clarity of understanding and ongoing management of

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ELEMENT	PERFORMANCE CRITERIA
	project finances
2. Monitor and control project costs	2.1 Implement agreed financial-management processes and procedures to monitor actual expenditure against budget 2.2 Select and use cost-analysis methods and tools to identify cost variations and evaluate alternative actions 2.3 Implement and monitor agreed actions to maintain financial objectives 2.4 Provide accurate and timely financial reports
3. Complete cost-management processes	3.1 Conduct appropriate activities to signify financial completion 3.2 Review project outcomes using available records to determine effectiveness of project cost management 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.2, 3.2, 3.3	• Interprets and analyses textual information from a range of sources • Reviews, compares and contrasts information related to budget
Writing	1.3, 1.4, 2.4, 3.3	• Drafts and develops documents using appropriate format and language for context
Oral Communication	1.1	• 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	1.1-1.4, 2.1, 2.2, 2.4, 3.1, 3.2	• Uses mathematical formulae to calculate resources against predetermined budgets, solve variances and finalise project costs
Navigate the world of work	1.4, 2.1	• Adheres to organisational policies and procedures and understands responsibilities of own role

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Interact with others	1.1	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to confirm requirements, seek guidance or share information
Get the work done	1.1, 1.3, 1.4, 2.2, 2.3, 2.4, 3.2, 3.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG514 Manage project cost	BSBPMG514A Manage project cost	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

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Assessment Requirements for BSBPMG514 Manage project cost

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 closely with others to determine resources against budgetary frameworks
- prepare a budget and cost-management plan for a project
- 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.

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 appropriate budgeting processes, tools and techniques
- describe methods and tools for costing and cost analysis
- explain strategies for managing costs and their application in different situations
- outline processes for reviewing costs against outcomes
- summarise key organisational policies and procedures applicable to this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation, including budgets and other financial documents
- case studies and, where possible, real situations.

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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

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BSBPMG515 Manage project human resources

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 human resources related to projects. It involves planning for human resources, implementing personnel training and development, and managing the project team.

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

Management and Leadership – Project Management

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. Plan human resources relevant to projects	1.1 Determine resource requirements for individual tasks to determine required project personnel levels and competencies 1.2 Establish project organisation and structure to align individual and group competencies with project tasks 1.3 Allocate personnel to the project to meet planned work outputs throughout project timeline 1.4 Apply human resources management (HRM) methods, techniques and tools to support engagement and performance of

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ELEMENT	PERFORMANCE CRITERIA
	personnel
2. Implement project personnel training and development	2.1 Negotiate, define and communicate clear project role descriptions 2.2 Identify, plan and implement ongoing development and training of project team members to support personnel and project performance 2.3 Measure individuals' performance against agreed criteria and initiate actions to overcome shortfalls in performance
3. Lead project team	3.1 Implement processes and take action to improve 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 to maintain a positive work environment 3.4 Identify and manage inter-project and intra-project resource conflict to minimise impact on achievement of project objectives
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	Performance Criteria	Description
Reading	1.1, 1.2, 2.3, 3.3, 4.1	• Interprets textual information obtained from a range of sources and determines how content may be applied to requirements
Writing	1.1-1.3, 2.1-2.3, 3.1, 3.2, 4.2	• 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

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		recommendations
Oral Communication	1.3, 1.4, 2.1, 3.1, 3.3, 3.4	• 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	1.1, 2.3, 3.4	• Uses mathematical formulae to calculate resources against project requirements and to measure work output against predetermined criteria
Navigate the world of work	3.3, 4.1	• Understands and adheres to organisational policies and procedures
Interact with others	1.3, 1.4, 2.1, 2.3, 3.1, 3.3, 3.4	• 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
Get the work done	1.1-1.4, 2.2, 2.3, 3.1, 3.2, 3.4, 4.2	• Develops plans to identify project responsibilities and needs, and allocate project personnel, with an awareness of how this contributes to overall project goals • Uses analytical skills to review performance and decide on actions needed • Reflects on how variables impact outcomes to gain insights into concepts that may be adapted in future situations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG515 Manage project human resources	BSBPMG515A Manage project human resources	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

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Assessment Requirements for BSBPMG515 Manage project human resources

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 and allocate human resources to a project
- 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.

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:

- summarise human resource management (HRM) methods, techniques and tools
- explain strategies for managing project human resources and their application to different situations
- explain processes used to measure individuals' performance against agreed criteria
- explain techniques for managing and improving performance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBPMG516 Manage project information and communication

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 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.

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

Management and Leadership – Project Management

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. Plan information and communication processes	1.1 Identify, analyse and document information requirements, with input from stakeholders, as the basis for communication planning 1.2 Develop, within delegated authority, an agreed communication management plan to support achievement of project objectives 1.3 Establish and maintain a designated project-management information system to ensure quality, validity, timeliness and integrity of information and communication

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ELEMENT	PERFORMANCE CRITERIA
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 to optimise quality and accuracy of data 2.3 Implement and maintain appropriate communication networks 2.4 Identify and resolve communication and 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 to determine effectiveness of management information and communication processes and procedures 3.3 Identify and document lessons learned and 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	Performance Criteria	Description
Reading	1.1-1.3, 3.1, 3.2	• Interprets and analyses complex texts from a range of sources
Writing	1.1-1.3, 2.1, 2.2, 3.1, 3.3	• Develops project documents using vocabulary, structure and conventions appropriate to text
Oral Communication	1.1, 1.2	• Participates in verbal exchanges using clear language and appropriate non-verbal features • Uses active listening and questioning to confirm understanding and agreement
Navigate the world of work	1.2	• Understands responsibilities and boundaries of own role
Interact with others	1.1, 1.2	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience

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Get the work done	1.1-1.3, 2.1, 2.2, 2.3, 2.4, 3.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG516 Manage project information and communication	BSBPMG516A Manage project information and communication	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

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Assessment Requirements for BSBPMG516 Manage project information and communication

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 a communication management plan and an information system for a specific project
- implement a project information system with a systematic approach to storage, searching, retrieval and archiving of relevant information
- implement and maintain communication processes
- review project outcomes and document suggestions for improvements to managing project information and communication for future projects.

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 alternative communication methods and media and their application on various projects
- identify effective project-management information systems and their various applications
- explain methods used to evaluate information systems and communication processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project communication and information management documentation
- examples of how communication was managed on projects
- case studies and, where possible, real situations.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBPMG517 Manage project risk

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 risks that may impact achievement of project objectives. It involves identifying, analysing, treating and monitoring project risks, and assessing risk management outcomes.

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

Management and Leadership – Project Management

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. Identify project risks	1.1 Determine risk objectives and standards, with input from stakeholders 1.2 Establish project risk context to inform risk management processes 1.3 Identify project risks using valid and reliable risk identification methods 1.4. Classify project risks within agreed risk categories

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ELEMENT	PERFORMANCE CRITERIA
2. Analyse project risks	2.1 Determine risk analysis classification criteria and apply to agreed risk ranking system 2.2 Use risk analysis processes, within delegated authority, to analyse and qualify risks, threats and opportunities 2.3 Determine risk priorities in agreement with project client and other 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 Consider and determine 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 regular risk review processes to maintain currency of risk plans 4.2 Regularly monitor risk environment to identify changed circumstances impacting project risks 4.3 Determine risk responses to changed environment 4.4 Implement agreed risk responses and modify plans to maintain currency of risk treatments and controls
5. Assess risk management outcomes	5.1 Review project outcomes to determine effectiveness of risk-management processes and procedures 5.2 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	Performance Criteria	Description
Reading	1.1-1.4, 2.1, 2.2, 3.1, 3.2, 4.2, 5.1, 5.2	• Interprets and critically analyses complex texts from a range of sources and determines how content may be applied according to organisational requirements

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Writing	1.3, 1.4, 2.1, 2.4, 3.1, 3.3, 3.4, 4.1, 4.3, 4.4, 5.2	• Documents risks, risk analysis and risk controls using required formats and structure • Modifies and updates workplace documentation according to requirements
Oral Communication	1.1, 2.3, 3.4	• Participates in verbal exchanges using clear language to provide and seek information • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.3, 2.1, 2.3	• Analyses numerical data to identify project risk levels and rank risks according to agreed system of classification
Navigate the world of work	1.1, 2.2	• Determines and adheres to organisational policies and standards • Considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.1, 2.3, 3.4	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information • Actively identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
Get the work done	1.1-1.4, 2.1, 3.2, 4.1, 4.4, 5.1	• Identifies and develops approaches to risk management and implements complex tasks to achieve outcomes • Analyses information to make decisions, involving others when appropriate • Uses formal and informal processes to monitor implementation of decisions and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG517 Manage project risk	BSBPMG517A Manage project risk	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBPMG517 Manage project risk

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:

- conduct effective risk management for a project of sufficient complexity to demonstrate the full range of performance requirements
- apply risk management techniques, strategies 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:

- identify project risks in a range of risk categories
- explain key components of a risk management plan
- outline industry sector risk classifications and relate these to different risk contexts
- summarise organisational and industry standard risk frameworks
- identify and describe characteristics, techniques and appropriate applications of quantitative and qualitative risk management techniques and approaches.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace risk management documentation
- feedback from project stakeholders about how risks were managed.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBPMG518 Manage project procurement

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 procurement in projects.

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

Management and Leadership – Project Management

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. Determine procurement requirements	1.1 Identify procurement requirements with input from stakeholders as basis for procurement planning 1.2 Establish and maintain, within delegated authority, agreed procurement management plan
2. Establish agreed procurement processes	2.1 Obtain information from suppliers capable of fulfilling procurement requirements 2.2 Determine or adopt established selection processes and selection criteria, and communicate to vendors to ensure transparency

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Obtain relevant approvals for procurement processes to be used

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	• Organises, evaluates and critiques ideas and information from a range of complex texts
Writing	1.2, 2.2, 2.3	• Develops plans using vocabulary, structure and conventions appropriate to text • Creates documents for external use using required format and vocabulary suitable for audience • Drafts requests for approvals using organisational formats
Oral Communication	1.1, 2.1, 2.3	• Participates in verbal exchanges using clear language to seek and provide information, or request approvals • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.1	• Recognises cost parameters and interprets numerical information accordingly
Navigate the world of work	1.2	• Understands responsibilities and boundaries of own role
Interact with others	1.1, 2.1-2.3	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information
Get the work done	1.1,1.2, 2.2	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Makes decisions based on analysis of options against set criteria

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG518 Manage project procurement	BSBPMG518A Manage project procurement	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

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Assessment Requirements for BSBPMG518 Manage project procurement

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 determine procurement requirements for a well-defined project
- monitor costs across a project's life cycle including solving cost variations and analysing alternatives
- record expenditure, create accurate financial reports and review cost management processes
- manage procurement and contracting 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:

- articulate requirements of contracts and legal obligations as they relate to project procurement
- explain ethical and behavioural expectations as they relate to project procurement in a project and industry context
- list general conditions of contracts significant in the procurement process
- summarise procurement options, procedures and documentation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation affecting procurement and contracts
- feedback from stakeholders about how procurement was managed

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- 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

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BSBPMG519 Manage project stakeholder engagement

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 stakeholder relationships.

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

Management and Leadership – Project Management

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. Identify and address stakeholder interests	1.1 Identify stakeholders relevant to project objectives 1.2 Segment stakeholder interests and determine forms of engagement 1.3 Consider interests of stakeholders when considering and advising on project management issues 1.4 Identify and implement actions to address differing interests where required
2. Manage effective stakeholder engagement	2.1 Support development of team members' interpersonal skills in effective stakeholder engagement

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Distribute team work effectively to ensure defined project roles are followed 2.3 Identify and clarify stakeholder behavioural expectations, where required 2.4 Openly lead stakeholder performance reviews 2.5 Identify and address individual development needs and opportunities to support stakeholder engagement
3. Manage stakeholder communications	3.1 Determine and document stakeholder communication needs 3.2 Ensure relevant stakeholders agree to communication method, content and timing of engagement 3.3 Communicate information as planned and in line with authority levels, identifying and addressing variances

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	• Recognises and interprets workplace documentation to determine pertinent information
Writing	1.1, 1.2, 3.1, 3.3	• Documents information about stakeholder interests and communication needs using appropriate vocabulary and formats
Oral Communication	1.3, 2.1, 2.3, 2.4, 2.5, 3.2, 3.3	• Participates in verbal exchanges using clear and detailed language to provide and seek information • Uses active listening and questioning to confirm understanding
Navigate the world of work	3.3	• Understands and works according to role parameters
Interact with others	2.1-2.5, 3.2, 3.3	• Actively 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

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Get the work done	1.1-1.4, 2.3, 3.1, 3.3	• Takes responsibility for decisions in complex situations involving multiple variables and constraints • Uses analytical skills to identify and address problems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG519 Manage project stakeholder engagement	BSBPMG519A Manage project stakeholder engagement	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

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Assessment Requirements for BSBPMG519 Manage project stakeholder engagement

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 implement stakeholder engagement for a project of sufficient complexity to demonstrate the full range of performance requirements
- implement a range of appropriate stakeholder communication mechanisms for a project
- demonstrate effective team leadership for project team and stakeholders.

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 common problems leading to variances in stakeholder engagement
- explain and analyse interests and expectations of stakeholders
- describe levels and means of stakeholder engagement
- identify and explain stakeholder engagement theory and strategies
- describe types of project stakeholders.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- examples of project management documentation for stakeholder engagement
- records of project team leadership in stakeholder engagement activities
- case studies and, where possible, real situations.

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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

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BSBPMG520 Manage project governance

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 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

Management and Leadership – Project Management

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. Identify project management structure	1.1 Determine organisational governance policies, procedures and expectations of project stakeholders 1.2 Negotiate clear and discrete project governance roles and responsibilities with relevant authorities 1.3 Establish delegated authorities for project decision-making 1.4 Identify and record differences between the organisation's functional authorities and project authorities 1.5 Adopt, document and communicate unambiguous governance

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ELEMENT	PERFORMANCE CRITERIA
	plan to relevant stakeholders
2. Apply project governance policies and procedures	2.1 Distribute and present information on governance planning to project team and other relevant stakeholders and ensure common understanding 2.2 Include delegated authorities within role and project position descriptions 2.3 Moderate conflicts regarding roles, responsibilities and authorities to support achievement of project objectives 2.4 Regularly report to the organisation and project authorities on performance and issues arising from governance arrangements
3. Monitor and review project governance	3.1 Analyse and review project governance impact on achieving project objectives 3.2 Document lessons learned and recommendations to assist 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	Performance Criteria	Description
Reading	1.1, 1.4, 2.3, 3.1	• Evaluates and critiques ideas and information from a range of sources and determines how content may be applied according to organisational requirements
Writing	1.4, 1.5, 2.2, 2.4, 3.2	• Records data according to organisational requirements • Develops plans, reports and recommendations using vocabulary, structure and conventions appropriate to text
Oral Communication	1.2, 1.5, 2.1, 2.3, 2.4	• Participates in a range of verbal exchanges using clear and detailed language to provide relevant information • Uses active listening and questioning to confirm understanding
Navigate the world of work	1.1, 2.4	• Recognises and responds to explicit and implicit organisational procedures and protocols
Interact with others	1.1, 1.2, 1.5, 2.1, 2.3, 2.4	• Selects and uses appropriate conventions and protocols when communicating with internal and external

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		stakeholders to seek or share information • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and agreement • Manages conflict in workplace through recognising contributing factors and implementing resolution strategies
Get the work done	1.1, 1.3, 1.4, 2.3, 3.1, 3.2	• Organises time and effort around priorities and results, focusing beyond immediate tasks to consider work performance of group • Takes responsibility for high-impact decisions in complex situations • Recognises and addresses complex problems involving multiple variables • Uses experience to reflect on how variables impact decision outcomes, and to gain insights into effective decision-making in different contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG520 Manage project governance	BSBPMG520A Manage project governance	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

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Assessment Requirements for BSBPMG520 Manage project governance

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:

- devise and implement a governance plan, with an appropriate project management structure for a project of sufficient complexity to demonstrate the full range of performance requirements
- demonstrate effective team leadership within context of project governance
- monitor and evaluate a project governance structure.

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 escalation and issues management models
- describe frameworks for authority delegations
- identify and analyse organisation or industry governance models in context of the project
- describe project governance plans
- explain methods to moderate and solve conflicts in context of project management.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Project Management field of work and include access to:

- examples of project governance documentation
- records of governance implementation in stakeholder and team activities.

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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

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BSBPMG521 Manage project integration

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 integrate and balance overall project management functions of scope, time, cost, quality, human resources, communications, risk and procurement across the project life cycle; and to align and track project objectives to comply with organisational goals, strategies and objectives.

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

Management and Leadership – Project Management

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 project	1.1 Identify, clarify and prepare project initiation documentation 1.2 Identify relationship between the project and broader organisational strategies and goals 1.3 Negotiate and document project objectives, outcomes and benefits 1.4 Negotiate project governance structure with relevant

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ELEMENT	PERFORMANCE CRITERIA
	authorities and stakeholders 1.5 Prepare and submit project charter for approval by relevant authorities
2. Undertake project planning and design processes	2.1 Establish and implement a methodology to disaggregate project objectives into achievable project deliverables 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 designated mechanisms to monitor and control planned activity 2.6 Negotiate approval of project plan with relevant stakeholders and project authority
3. Execute project in work environment	3.1 Manage the project in an established internal work environment to ensure work is conducted effectively throughout the project 3.2 Maintain established links to align project objectives with organisational objectives throughout the project 3.3 Within authority levels, resolve conflicts negatively affecting attainment of project objectives
4. Manage project control	4.1 Ensure project records are updated against project deliverables and plans at required intervals 4.2 Analyse and submit status reports on project progress and identified issues with stakeholders and relevant authorities 4.3 Analyse and submit impact analysis of change requests for approval, where required 4.4 Maintain relevant project logs and registers accurately and regularly to assist with project audit 4.5 Ensure associated plans are updated to reflect project progress against baselines and approved changes
5. Manage project finalisation	5.1 Identify and allocate project finalisation activities 5.2 Ensure project products and associated documentation are prepared for handover to client in a timely manner 5.3 Finalise financial, legal and contractual obligations

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Undertake project review assessments as input 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.4, 4.1, 4.2, 4.3	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.3, 1.5, 2.2, 2.4, 4.1, 4.4, 4.5	• Develops and maintains project documentation using formats and language appropriate to context
Oral Communication	1.3, 1.4, 2.6	• Participates in verbal exchanges using clear and detailed language to provide and seek information • Uses active listening and questioning to confirm understanding
Numeracy	1.1, 2.1-2.4, 4.2, 4.3, 5.3	• Uses a wide range of mainly formal and some informal, oral and written mathematical language and representation to communicate mathematically
Navigate the world of work	1.2, 1.5, 5.3	• Adheres to organisational and legislative requirements
Interact with others	1.3,1.4, 2.6, 3.3	• Selects and uses appropriate communication practices to seek or share information with stakeholders • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and negotiating outcomes
Get the work done	1.1, 1.2, 1.5, 2.1-2.5, 3.1, 3.2, 4.1-4.5, 5.1-5.4	• Organises time and effort around priorities and results, focusing beyond immediate tasks to consider work performance of the group • Sequences and schedules complex activities, monitors implementation and manages relevant communication • Reflects on outcomes to contribute to future projects

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG521 Manage project integration	BSBPMG521A Manage project integration	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

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Assessment Requirements for BSBPMG521 Manage project integration

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 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.

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:

- summarise project governance models
- describe range of methodologies to break project objectives into achievable project deliverables
- outline role of project life cycle stages, phases and structures relevant to industry and project context
- identify and describe appropriate organisational documentation for recording strategies and goals for integration processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- project documentation
- case studies and, where possible, real situations

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- 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

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BSBPMG522 Undertake project work

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 straightforward 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.

This 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.

The unit does not apply to specialist project managers. For specialist project managers, the other units of competency in the project management field (BSBPMG) will be applicable.

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

Unit Sector

Management and Leadership – Project Management

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. Define project	1.1 Access project scope and other relevant documentation 1.2 Define project stakeholders 1.3 Seek clarification from delegating authority of issues related to

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ELEMENT	PERFORMANCE CRITERIA
	project and project parameters 1.4 Identify limits of own responsibility and reporting requirements 1.5 Clarify relationship of project to other projects and to the organisation's objectives 1.6 Determine and access available resources to undertake project
2. Develop project plan	2.1 Develop project plan in line with the project parameters 2.2 Identify and access appropriate project management tools 2.3 Formulate risk management plan for project, including Work Health and Safety (WHS) 2.4 Develop and approve project budget 2.5 Consult team members and take their views into account in planning the project 2.6 Finalise project plan and gain necessary approvals to commence project according to documented plan
3. Administer and monitor project	3.1 Take action to ensure project team members are clear about their responsibilities and the project requirements 3.2 Provide support for project team members, especially with regard to specific needs, to ensure that the quality of the expected outcomes of the project and documented time lines are met 3.3 Establish and maintain required recordkeeping systems throughout the project 3.4 Implement and monitor plans for managing project finances, resources and quality 3.5 Complete and forward project reports as required to stakeholders 3.6 Undertake risk management as required to ensure project outcomes are met 3.7 Achieve project deliverables
4. Finalise project	4.1 Complete financial recordkeeping associated with project and check for accuracy 4.2 Ensure transition of staff involved in project to new roles or reassignment to previous roles 4.3 Complete project documentation and obtain necessary sign-offs for concluding project
5. Review project	5.1 Review project outcomes and processes against the project scope and plan

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ELEMENT	PERFORMANCE CRITERIA
	5.2 Involve team members in the project review 5.3 Document lessons learned from the project and report within the organisation

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, 3.4, 3.5, 4.1, 4.3, 5.1	• Organises, evaluates and critiques ideas and information from a range of complex texts
Writing	2.1, 2.3, 2.6, 3.3, 3.5, 4.1, 4.3, 5.3	• Develops plans, reports and recommendations using vocabulary, structure and conventions appropriate to text • Establishes and maintains records according to organisational requirements
Numeracy	1.6, 2.4, 3.4, 4.1	• Uses formal and some informal, oral and written mathematical language and representation to prepare and communicate budgetary and financial information
Oral communication	2.5, 5.2	• 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
Navigate the world of work	1.3, 1.4, 2.3, 3.1, 4.3	• Recognises and responds to organisational and legislative/regulatory requirements
Interact with others	2.5, 3.1, 3.2, 4.2, 5.2	• 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
Get the work done	1.2, 1.5, 1.6, 2.1, 2.2, 2.3, 2.6, 3.1-3.7, 4.1, 4.2, 4.3, 5.1, 5.3	• 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

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		opportunities for improvement • Uses digital technologies and applications to access, organise and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG522 Undertake project work	BSBPMG522A Undertake project work	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

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Assessment Requirements for BSBPMG522 Undertake project work

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:

- define the parameters of the project including:
  - project scope
  - project stakeholders, including own responsibilities
  - relationship of project to organisational objectives and other projects
  - reporting requirements
  - resource requirements
- use project management tools to develop and implement a project plan including:
  - deliverables
  - work breakdown
  - budget and allocation of resources
  - timelines
  - risk management
  - recordkeeping and reporting
- 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
- finalise the project including documentation, sign-offs and reporting
- review and document the project outcomes.

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:

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- give examples of project management tools and how they contribute to a project
- outline types of documents and other sources of information commonly used in defining the parameters of a project
- explain processes for identifying and managing risk in a project
- outline the organisation's mission, goals, objectives and operations and how the project relates to them
- explain the organisation's procedures and processes that are relevant to managing a project including:
  - lines of authority and approvals
  - quality assurance
  - human resources
  - budgets and finance
  - recordkeeping
  - reporting
- outline the legislative and regulatory context of the organisation in relation to project work, including work health and safety (WHS) requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBPMG601 Direct the integration of projects

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 direct the integration of all functions of project management in a program or multiple-project context, as well as directing the internal project environment to meet external needs and expectations, and directing projects within a program throughout their life cycle.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct integration of all functions of project management	1.1 Support project managers in project stakeholder analysis to determine influence of others on project outcomes 1.2 Analyse, rationalise and integrate requirements of all projects, and inter-relationships of project management functions, to determine agreed, achievable program objectives that align to organisational goals, strategies and objectives as stated in strategic planning documentation 1.3 Review, rationalise and, when approved, integrate project plans

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ELEMENT	PERFORMANCE CRITERIA
	into a structured, cohesive program plan for program management 1.4 Derive integrated program-control mechanisms from project plans, to establish program-control requirements 1.5 Use project plans to develop consolidated program budgets, schedules and interdependencies, and to identify program risks
2. Direct internal project environment to meet external needs and expectations	2.1 Ensure project managers' work is conducted effectively throughout multiple, aligned project life cycles 2.2 Establish and maintain links to direct alignment between projects and organisational objectives within the program 2.3 Evaluate project proposals (scope definitions) against organisation’s strategic objectives 2.4 Coordinate and direct conflicting requirements of individual projects to achieve program objectives 2.5 Modify, where necessary, individual project objectives to achieve overall program objectives 2.6 Coordinate impact of external environmental influences on individual projects to achieve program objectives
3. Direct projects throughout project life cycles	3.1 Direct all project managers to provide project phases, approval points, review points and other milestones, to allow program integration 3.2 Establish project baselines and report progress in relation to these baselines, to measure program performance throughout business reporting cycle 3.3 Progressively review project baselines to ensure nominated benefits are consistent with organisational expectations 3.4 Direct finalisation plans, procedures and activities to ensure final outcomes are met, and projects meet agreed program objectives 3.5 Review finalised projects in a program-management reporting period to evaluate benefits to the business 3.6 Pass on integration-management lessons learnt to higher project authority and provide feedback for application to other projects

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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	• Interprets and critically analyses complex texts • Applies appropriate strategies to construct meaning from complex texts
Writing	1.3, 1.5, 2.5, 3.2, 3.5, 3.6	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 2,1, 3.1	• Participates in discussions and presents information using language and features appropriate to the audience
Numeracy	1.5, 3.4	• Extracts and evaluates mathematical information embedded in a range of tasks and texts • Selects from, and applies, an expanding range of mathematical and problem-solving strategies in a range of contexts
Interact with others	1.1, 2,1, 3.1	• Collaborates with others to achieve joint outcomes, playing a lead role in facilitating successful outcomes and influencing direction
Navigate the world of work	1.2, 2.2, 3.3, 3.5	• Understands how own role contributes to broader organisational goals
Get the work done	1.1-1.5, 2.1-2.6, 3.3, 3.5	• Develops flexible plans for complex, high impact activities that involve stakeholders with potentially competing demands • Regularly reviews priorities and performance during implementation, identifying and addressing issues and reallocating resources • Uses analytical processes to identify key information and issues, evaluate alternative strategies, anticipate consequences and consider implementation issues and contingencies • Reviews outcomes to evaluate results against goals, and to identify opportunities for improvement

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG601 Direct the integration of projects	BSBPMG601A Direct the integration of projects	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

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Assessment Requirements for BSBPMG601 Direct the integration of projects

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:

- direct integration of all functions of project management, including:
  - determining stakeholder influence and program objectives
  - rationalising and integrating project plans into a program plan
  - establishing program control requirements
  - developing consolidated program budgets, schedules and interdependencies
  - identifying program risks
- direct the internal project environment, throughout multiple, aligned project life cycles, to meet external needs and expectations, including:
  - establishing links to direct alignment of projects with organisational objectives
  - evaluating project proposals against organisational objectives
  - coordinating and directing conflicting individual project requirements to achieve program objectives
  - modifying individual project objectives to achieve program objectives
  - coordinating impact of external environmental influences to achieve program objectives
- direct projects throughout project life cycles, including:
  - directing project managers to provide information to enable program integration
  - establishing and reporting progress against baselines, to measure program performance
  - reviewing baselines
  - directing finalisation plans, procedures and activities to ensure outcomes and objectives are met
  - evaluating benefits to business
  - passing on lessons learnt and feedback.

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

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Knowledge Evidence

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

- describe key steps in program planning
- outline methodologies, tools and techniques for project management
- describe a range of leadership models
- summarise relevant legislation, codes and national standards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- relevant project documentation
- feedback from project stakeholders
- 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

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BSBPMG602 Direct the scope of a project program

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 direct the scope of projects within a program, or multiple projects context. It covers management of project authorisations and defining, planning and managing the program scope.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Authorise projects	1.1 Analyse needs, in consultation with client and relevant stakeholders, to justify each project and to designate project managers 1.2 Conduct project selection and prioritisation within guidelines provided by, or under the direction of, a relevant (governance) authority 1.3 Make project authorisation recommendations to relevant authority as basis for future project management activities, and commitment of resources and effort

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ELEMENT	PERFORMANCE CRITERIA
2. Define and plan program scope	2.1 Define projects' objectives, major deliverables and resource requirements at project and program level, and confirm with governance group or relevant authority 2.2 Determine and agree measurable project outcomes and benefits to enable quantified evaluation of program performance 2.3 Develop, agree on, and communicate scope definition, scope management strategies, and plans 2.4 Align program scope to business requirements and organisational strategy
3. Manage program scope	3.1 Conduct regular program reviews to measure project performance and ensure stated program and business/strategic objectives are met 3.2 Establish and maintain a change management system to form basis of ongoing scope management 3.3 Conduct reviews of scope changes and take action to ensure project and program objectives are achieved or modified 3.4 Measure project outcomes against defined program scope and aligned strategic objectives 3.5 Communicate results of program outcomes to relevant authority 3.6 Pass on scope management lessons learnt to higher project authority for application in planning and implementation of later projects within the program

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, 2.4, 3.1	• Interprets and critically analyses complex texts
Writing	1.3, 2.1, 3.2, 3.3, 3.5, 3.6	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 2.1, 2.3, 3.5	• Provides information using language and structure appropriate to audience

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		• Uses listening and questioning skills to check and confirm understanding of needs
Numeracy	3.1, 3.4	• Extracts and evaluates mathematical information embedded in tasks and texts • Selects from, and applies mathematical and problem-solving
Interact with others	1.1, 1.3, 2.1, 2.3, 3.5, 3.6	• Identifies and uses appropriate practices and protocols when communicating with project stakeholders • Collaborates with others to achieve joint outcomes, playing an active role in leading and facilitating effective group interaction
Get the work done	1.1, 1.2, 2.1-2.4, 3.1-3.4, 3.6	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Monitors actions against goals, adjusting plans and resources to cope with contingencies • 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 • 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**
BSBPMG602 Direct the scope of a project program	BSBPMG602A Direct the scope of a project program	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

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Assessment Requirements for BSBPMG602 Direct the scope of a project program

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:

- authorise a range of concurrent projects, including:
  - justifying projects and designating project managers through needs analysis
  - conducting project selection and prioritisation
  - making project-authorisation recommendations
- define and plan program scope, including:
  - defining and confirming project- and program-level objectives, major deliverables and resource requirements
  - determining and agreeing measurable outcomes and benefits to enable program performance evaluation
  - developing, agreeing on and communicating scope definition, scope management strategies and plans
  - aligning scope to business requirements and organisational strategy
- manage program scope, including:
  - conducting regular program reviews
  - establishing and maintaining a change management system
  - conducting reviews of scope changes
  - measuring project outcomes
  - communicating results of program outcomes
  - passing on scope management lessons learnt.

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:

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- describe a broad range of scope management plans, methodologies, techniques and tools
- outline project life cycle and significance of scope management
- identify typical challenges and issues encountered in project scope management and options for addressing these.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation, including feedback from stakeholders, which reflects how scope was managed
- 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

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BSBPMG603 Direct time management of a project program

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 direct time management across projects so that key deliverables meet project and program schedules.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct project schedule development	1.1 Determine from individual project plans the duration, effort, sequence and interdependencies of major activities and milestones to form the basis of the program schedule 1.2 Direct project managers, through use of time management methods, techniques and tools, preferred schedules, time management plans, resource allocation and financial requirements, to enable continuous updating and refining of the program schedule 1.3 Formalise and communicate project schedules to stakeholders, with agreement, as basis for planning, implementation and review

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ELEMENT	PERFORMANCE CRITERIA
	of progress
2. Manage program schedules	2.1 Develop, implement and modify mechanisms to monitor, control, record and report actual progress in relation to agreed schedule and plans 2.2 Conduct ongoing analysis to identify and forecast variances and trends, and to develop responses, so projects meet their schedules 2.3 Manage durations of key activities and interdependencies between projects to enable financial and resource rationalisation across the program, to meet strategic expectations within the management/reporting period of the program 2.4 Review progress and refine schedules throughout the program life cycle to ensure consistency with changing scope, objectives and constraints related to time and resource availability 2.5 Ensure responses to perceived, potential or actual project schedule changes are authorised, to achieve program objectives
3. Analyse time management outcomes	3.1 Review and analyse multiple project and program outcomes from available records and information to determine effectiveness of the schedule and time-management processes 3.2 Pass on lessons learnt to higher project authority and provide feedback for application, planning and implementation of later projects within the program

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	• Interprets and critically analyses complex texts • Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 1.3, 2.1, 2.4, 3.1, 3.2	• Develops and refines a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.3, 3.2	• Presents information using language and features appropriate to the audience

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Numeracy	1.1, 1.2, 2.1-2.3, 3.1	• Analyses and synthesises highly embedded mathematical information • Selects from, and flexibly applies, a range of mathematical and problem-solving strategies and techniques
Navigate the world of work	2.5	• Recognises and responds to both explicit and implicit protocols within familiar work contexts and appreciates importance of identifying and responding to protocols in new situations
Interact with others	1.2, 1.3, 3.2	• Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills and ability to engage and motivate others
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1	• Analyses a range of complex variables to decide on appropriate project schedule • Develops plans for complex activities that contribute to overall project goals and involve multiple stakeholders • Regularly reviews progress during implementation, identifying and addressing issues and reallocating resources • Applies problem-solving processes to analyse and address time-management issues • 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**
BSBPMG603 Direct time management of a project program	BSBPMG603A Direct time management of a project program	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

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Assessment Requirements for BSBPMG603 Direct time management of a project program

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:

- direct project schedule development, including:
  - determining details from individual project plans to base the program schedule on
  - directing project managers, to enable continuous updating and refinement of the program schedule
  - formalising and communicating project schedules to stakeholders as basis for planning, implementation and progress review
- manage program schedules, including:
  - developing, implementing and modifying mechanisms to monitor, control, record and report progress
  - conducting ongoing analysis so projects meet schedules
  - managing durations of key activities and interdependencies between projects
  - reviewing progress and refining schedules throughout the program life cycle
  - ensuring responses to project schedule changes are authorised
- analyse time management outcomes, including:
  - reviewing and analysing multiple project and program outcomes
  - passing on lessons learnt.

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 relationship between time, cost and resources, and the project management framework
- explain time management and estimating

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- describe time management methodologies, techniques and tools, their capabilities, limitations, applicability and outcomes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access:

- to workplace documentation, including feedback from project team and stakeholders, which reflects how time was managed.

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

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BSBPMG604 Direct cost management of a project program

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 analyse, coordinate, and refine budgets of multiple projects contributing to an overall program budget. It covers directing project budget development, managing program costs and directing financial completion of projects.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct project budget development	1.1 Direct project managers to determine resource requirements for individual tasks, in consultation with appropriate stakeholders, to develop project budgets which contribute to the program budget 1.2 Direct project cost estimations to enable budgets and cost management processes to be developed for project life cycles 1.3 Direct and authorise cost strategies and cost management plans to ensure clarity of understanding and ongoing management of project finances and the program budget

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ELEMENT	PERFORMANCE CRITERIA
2. Manage program costs	2.1 Develop and maintain cost management systems to direct monitoring of actual expenditure and to control costs throughout multiple project life cycles and for the program 2.2 Conduct analysis, evaluate options and implement responses to project cost variations to maintain control over changing financial and program objectives 2.3 Monitor internal and external influences on program costs and, where necessary, seek approval from business management for changes to the approved program budget
3. Direct financial completion	3.1 Provide direction for project finalisation activities to achieve integrated financial and physical project completion within program expectations 3.2 Review project outcomes from available records at the finalisation of each project, and analyse information to determine effectiveness of cost management systems 3.3 File program lessons learnt as a resource for future reference and, where necessary, refer to higher project authority for application in planning strategic direction changes and business outcomes 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	Performance Criteria	Description
Reading	1.3, 2.2, 3.1, 3.2	• Organises, evaluates and critiques ideas and information from a range of complex texts
Writing	1.3, 2.1-2.3, 3.2, 3.3	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.2, 1.3, 3.1	• Participates in discussions and presents information using language and features appropriate to the audience
Numeracy	1.1-1.3, 2.1-2.3, 3.1, 3.2	• Analyses and synthesises highly embedded mathematical information • Selects from, and flexibly applies, a wide range of highly developed mathematical and problem-solving strategies and techniques

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Interact with others	1.1-1.3, 3.1	• Collaborates with others to achieve joint outcomes, playing a lead role in facilitating successful outcomes and influencing direction
Get the work done	1.1-1.3, 2.1-2.3, 3.2, 3.3	• Develops and implements plans for complex activities that contribute to overall project goals • Reviews priorities and performance during implementation, identifying and addressing issues and reallocating resources • Monitors outcomes of decisions, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable to future situations • Uses digital tools to access and organise complex data and analyse multiple sources of information for strategic purposes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG604 Direct cost management of a project program	BSBPMG604A Direct cost management of a project program	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

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Assessment Requirements for BSBPMG604 Direct cost management of a project program

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:

- direct project budget development, including:
  - directing project managers to develop project budgets which contribute to program budget
  - directing project cost estimation
  - directing and authorising cost strategies and cost management plans
- manage program costs, including:
  - developing and maintaining cost management systems
  - conducting analysis, evaluating options and implementing responses to project cost variations
  - monitoring internal and external influences on program costs and seeking approval for budget changes
- direct financial completion, including:
  - providing direction for project finalisation activities
  - reviewing and analysing project outcomes
  - filing and referring program lessons learnt to higher program authority for future application.

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 regulatory and legislative financial reporting requirements
- explain methods for costing and estimating project resources
- explain methods for monitoring and controlling project expenditure.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- financial documentation and files
- feedback from project teams and other stakeholders as to how program costs were managed.

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

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BSBPMG605 Direct quality management of a project program

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 direct quality management across multiple projects and within an overall program. It covers directing development of quality requirements, directing quality assurance management, and reviewing and improving quality of projects and the program.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct quality requirements development	1.1 Direct reviews and consultation to ensure the organisation's quality objectives, standards, levels and criteria are applied at project level, in consultation with stakeholders 1.2 Modify quality management methods, techniques and tools to program requirements, as necessary 1.3 Identify and communicate program quality criteria to project managers for implementation 1.4 Direct project managers to develop and implement quality

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ELEMENT	PERFORMANCE CRITERIA
	plans to use as basis for performance measurement
2. Direct project quality assurance management	2.1 Analyse results of project activities and product performance to determine compliance with agreed quality standards throughout project life cycles within the program 2.2 Identify causes of unsatisfactory results in consultation with project managers, clients and stakeholders, and initiate appropriate actions to enable continuous improvement in quality outcomes 2.3 Direct inspections of quality processes and analyse results to determine compliance with quality standards set for the overall program and organisation 2.4 Develop and maintain a quality management system to enable effective management and communication of quality issues and outcomes
3. Improve program and project quality	3.1 Continually review and modify the quality management system throughout project activities to ensure project team commitment to continuous improvement of quality processes and outcomes 3.2 Direct project outcomes review and analysis against performance criteria to determine effectiveness of the quality management system 3.3 Aggregate and use quality improvements and lessons learnt to benefit the business and, where appropriate, pass on program initiatives/projects to organisational management for consideration in support of strategic planning and (re)direction

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, 3.2	• Organises, evaluates and critiques ideas and information from complex texts • Draws on a broad range of strategies to build and maintain understanding throughout complex texts
Writing	1.3, 2.4, 3.2, 3.3	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral	1.1, 1.3, 1.4, 2.2,	• Participates in discussions, and presents information,

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Communication	2.3, 3.2	using language and features appropriate to audience
Numeracy	1.2, 2.3, 3.2	• Extracts, interprets and evaluates mathematical information embedded in quality management documentation • Performs calculations needed to analyse results of quality inspections
Interact with others	1.1, 1.3, 1.4, 2.2, 2.3, 3.2	• Collaborates with others to achieve joint outcomes, leading and facilitating direction
Navigate the world of work	1.1, 2.3, 3.3	• Understands how own role relates and contributes to the goals and objectives of the organisation
Get the work done	1.1-1.4, 2.1-2.4, 3.1-3.3	• Develops plans for complex activities that contribute to overall project goals and involve multiple stakeholders • Monitors actions against goals, adjusting plans and resources to cope with contingencies • Identifies issues and uses analytical techniques to generate and evaluate possible solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG605 Direct quality management of a project program	BSBPMG605A Direct quality management of a project program	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

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Assessment Requirements for BSBPMG605 Direct quality management of a project program

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:

- direct quality requirements development, including:
  - directing reviews and consultation to ensure application of organisational quality objectives, standards, levels and criteria
  - modifying quality management methods, techniques and tools
  - identifying and communicating program quality criteria
  - directing project managers to develop and implement quality plans
- direct project quality assurance management, including:
  - analysing results of project activities and product performance to determine compliance with agreed standards throughout project life cycles
  - identifying causes of unsatisfactory results and initiating actions to enable continuous improvement
  - directing inspections of quality processes and analysing results to determine compliance with program and organisational quality standards
  - developing and maintaining a quality management system
- improve program and project quality, including:
  - continually reviewing and modifying the quality management system to ensure project team commitment to continuous improvement
  - directing project outcomes review and analysis to determine system effectiveness
  - aggregating, using and passing on quality improvements and lessons learnt.

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:

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- describe a range of quality management methods, techniques, tools and systems and their various applications
- identify relevant Australian and international standards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace quality documentation
- feedback from project team/s and stakeholders as to how quality was managed.

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

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BSBPMG606 Direct human resources management of a project program

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 direct human resource organisation and staffing across a program, direct project managers in relation to staff performance, and to provide leadership within the program.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct human resources management planning	1.1 Direct human resource requirement analysis for projects to determine numbers and skill levels required for overall program 1.2 Direct stakeholder assessment to establish a basis for stakeholder management within projects and overall program 1.3 Direct responsibility assignment for project activities and tasks, and establish authorisation protocols
2. Manage program	2.1 Determine resource requirements for projects in consultation

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ELEMENT	PERFORMANCE CRITERIA
organisation and staffing	with project managers and appropriate stakeholders, to establish program staffing levels, allocation to projects and required competencies 2.2 Direct project organisation and structure to optimise alignment of individual and group competencies within projects 2.3 Direct recruitment of staff for allocation to projects or reallocation within the organisation, within agreed delegated authority, to meet competency requirements throughout the program 2.4 Direct project managers' use of human resources management (HRM) methods, techniques and tools, and modify for program requirements 2.5 Utilise organisational HRM system and HRM processes across projects
3. Direct project staff performance management	3.1 Obtain agreement on performance measurement criteria for clarity of roles and responsibilities and ongoing assessment 3.2 Ensure systems for ongoing development and training of personnel across the program are established and implemented by project managers 3.3 Measure individuals' performance against agreed criteria and authorise actions to overcome shortfalls in performance and encourage career progression
4. Provide overall leadership to project teams	4.1 Manage a system of continuous improvement of staff to enhance program effectiveness 4.2 Analyse individual and team performance and morale levels and take action where necessary 4.3 Direct procedures for interpersonal communication, counselling and conflict resolution by project managers, and review results to maintain and promote a positive working environment 4.4 Identify and positively manage intra-organisational and intra-project conflict to maximise achievement of program objectives 4.5 Aggregate HRM lessons learnt for application in planning and, where appropriate, pass on information to others for consideration in strategic planning and direction

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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, 3.3	• Organises, evaluates and critiques ideas and information from complex texts • Draws on a broad range of strategies to build and maintain understanding throughout complex texts
Writing	1.3, 2.1, 2.2, 2.3, 3.1, 3.3, 4.5	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 4.2, 4.3, 4.4	• Provides information using language and features appropriate to the audience • Use listening and questioning skills to confirm or clarify understanding
Numeracy	1.1, 2.1, 2.2, 3.1, 4.2	• Extracts, interprets and evaluates mathematical information in organisational and project documentation • Compares and contrasts performance against criteria
Interact with others	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 4.2, 4.3, 4.4	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience • Plays a lead role in situations requiring effective collaborative skills, demonstrating ability to influence and motivate others • Recognises potential for conflict and takes steps to stop an issue from escalating
Get the work done	1.1-1.3, 2.2-2.5, 3.1, 3.3, 4.1, 4.2	• Develops plans for complex activities that contribute to overall project goals and involve multiple stakeholders • Regularly reviews priorities and performance during implementation, identifying and addressing issues, and reallocating resources • Identifies issues and uses analytical techniques to generate and evaluate possible solutions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG606 Direct human resources management of a project program	BSBPMG606A Direct human resources management of a project program	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

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Assessment Requirements for BSBPMG606 Direct human resources management of a project program

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:

- direct human resources management (HRM) planning, including:
  - directing project analysis to determine program requirements
  - directing stakeholder assessment
  - directing responsibility assignment and establishing authorisation protocols
- manage program organisation and staffing, including:
  - determining project resource requirements
  - directing project organisation and structure
  - directing staff recruitment
  - directing project managers' use of HRM methods, techniques and tools
  - utilising organisational HRM system and processes across projects
- direct project staff performance management, including:
  - obtaining agreement on measurement criteria
  - ensuring systems for ongoing development and training
  - measuring individuals' performance and authorising relevant actions
- provide overall leadership to project teams, including:
  - managing a continuous improvement system
  - analysing and taking action on individual and team performance and morale levels
  - directing procedures for interpersonal communication, counselling and conflict resolution by project managers, and reviewing results
  - identifying and positively managing intra-organisational and intra-project conflict
  - aggregating and passing on HRM lessons learnt.

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

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Knowledge Evidence

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

- explain human resource management methods, techniques and tools
- identify relevant legislation
- describe models of performance management and performance development.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace HRM documentation
- feedback from project teams and stakeholders as to how human resource management was handled.

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

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BSBPMG607 Direct communications management of a project program

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 the critical link between people, ideas and information at all stages in the life cycles of multiple projects across a program. It covers directing project communications and information management, managing program communications, and analysing communications management outcomes for projects and programs.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct planning of project communications	1.1 Direct project information requirements, in consultation with appropriate stakeholders, as basis for projects and program communications planning 1.2 Direct communications management plans and activities to ensure clarity of understanding and achievement of multiple project objectives at all levels

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Develop project management information system (PMIS), structure and procedures to maintain quality, validity, timeliness and integrity of information and communication across the program and in regard to organisational strategic management
2. Direct management of project information	2.1 Direct generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders to improve decision-making processes and communications across the program and between projects 2.2 Direct information validation processes for development, management and modification to ensure consistent quality and accuracy of data across the program
3. Manage program communications	3.1 Develop and manage formal and informal communication networks between the organisation's management structure, program, projects and key stakeholders to ensure effectiveness throughout multiple life cycles of projects within the program 3.2 Address potential, perceived and actual problems with communication and management information systems through project managers, and ensure remedial actions are authorised, to ensure project, program and organisational objectives are met 3.3 Manage customer relationships beyond delegated responsibility of project managers, to ensure clarity of understanding of objectives and to minimise conflict across the program
4. Analyse communications management outcomes	4.1 Direct project finalisation activities to ensure ownership of, and responsibility for, information outcomes 4.2 Review and analyse project outcomes to determine effectiveness of management information and communications systems 4.3 Aggregate and use lessons learnt across multiple projects for other program and organisational applications

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

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Reading	1.2, 1.3, 2.1, 4.2	• Identifies, reviews and interprets project and organisational documentations
Writing	1.3, 4.2, 4.3	• Develops and refines a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 3.3, 4.1	• Presents information using language and features appropriate to the audience
Numeracy	1.3, 4.2	• Extracts, interprets and evaluates mathematical information in organisational and project documentation • Compares and contrasts performance of communication processes against plan
Interact with others	1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 3.3, 4.1	• Demonstrates understanding of what to communicate, with whom and how • Tailors communication to achieve its purpose, demonstrating a sophisticated understanding of needs, interests, issues and priorities of each audience • Recognises potential for conflict and takes steps to stop issues escalating
Get the work done	1.1-1.3, 2.1, 2.2, 3.2, 4.2, 4.3	• Uses planning skills to identify project and program information requirements • 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 • Gathers data and seeks feedback from others to gain new perspectives and identify ways to strengthen future planning processes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG607 Direct communications management of a project program	BSBPMG607A Direct communications management of a project program	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBPMG607 Direct communications management of a project program

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:

- direct planning of project communications, including:
  - directing project information requirements as basis for projects and program communications planning
  - directing plans and activities to ensure understanding and achievement of multiple project objectives
  - developing project management information system (PMIS), structure and procedures
- direct management of project information, including:
  - directing generation, gathering, storage, retrieval, analysis and dissemination of information
  - directing information validation processes
- manage program communications, including:
  - developing and managing formal and informal communication networks
  - addressing potential, perceived and actual problems
  - managing customer relationships
- analyse communications management outcomes, including:
  - directing project finalisation activities
  - reviewing and analysing project outcomes
  - aggregating and using lessons learnt.

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 PMIS structures and options

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- explain information validation processes and their application to various contexts
- summarise new technologies for communications and their relative strengths and weaknesses.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation
- feedback from project teams and stakeholders as to how communications were managed.

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

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BSBPMG609 Direct procurement and contracting for a project program

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 direct the management of contracting and procurement activities across projects and programs. It covers setting up the contracting process, directing management of contract and procurement processes, and finalising contracts for projects across the program.

It applies to individuals who are program managers, managing a suite of projects (a program).

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

Unit Sector

Management and Leadership – Project Management

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. Direct planning for project contracting and procurement	1.1 Direct identification of product specifications and procurement requirements for procurement and contract planning, in consultation with appropriate stakeholders 1.2 Direct development of procurement strategies, methods and management plans in line with project objectives across the program
2. Direct set up of	2.1 Direct project managers to source organisations that meet

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ELEMENT	PERFORMANCE CRITERIA
contract and procurement process	procurement requirements 2.2 Establish selection processes and selection criteria, in consultation with stakeholders, and arrange for communication to prospective contractors 2.3 Ensure contract and procurement actions accord with organisation and program objectives
3. Direct management of contract and procurement process	3.1 Provide direction for identification of requirements of proposals and arrange communication to prospective contractors 3.2 Ensure responses are evaluated and preferred contractors are selected in accordance with agreed selection processes 3.3 Direct negotiation of contract terms and conditions between client and preferred contractor
4. Direct management of contracts	4.1 Direct management of contract and procurement activities in accordance with program contract and procurement management guidelines 4.2 Provide direction for regular reviews from available records and information, and ensure variances are analysed and changes for implementation agreed on 4.3 Ensure project managers work within legal and organisational framework for contracts 4.4 Identify potential, perceived and actual contractual conflicts and approve remedial actions to minimise disruption
5. Direct finalisation of contracts	5.1 Direct finalisation activities for management of contract deliverables in accordance with contractual project and program requirements 5.2 Direct review and analysis of project outcomes to determine effectiveness of contract and procurement processes and procedures 5.3 Aggregate and use lessons learnt for application in planning and implementation of later projects within the program and, where appropriate, pass on to organisational management for use in strategic planning

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	2.3, 4.1, 4.3, 5.2	• Identifies, interprets and analyses information from complex sources, including legislation
Writing	1.2, 2.2, 3.1, 3.2, 4.2, 4.4, 5.2, 5.3	• Develops and documents strategies and plans using organisational format and specific terminology • Documents outcomes according to organisational requirements
Oral Communication	1.1, 1.2, 2.1, 2.2, 3.3, 4.4, 5.2	• Provides direction and contributes to discussions using language and features appropriate to the audience
Numeracy	1.2, 4.1, 4.2, 5.2	• Interprets and evaluates mathematical information in a broad range of texts • Selects from, and flexibly applies, a range of mathematical and problem-solving strategies and techniques to compare and contrast effectiveness of processes
Navigate the world of work	2.3, 4.3	• Monitors adherence to organisational, legal and regulatory requirements
Interact with others	1.1, 1.2, 2.1, 2.2, 3.3, 4.4, 5.2	• Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills and ability to direct others • Uses negotiation skills to set up contracts, to agree prices and terms, and to resolve disputes
Get the work done	1.1, 2.1-2.3, 3.2, 4.1, 4.2, 5.1, 5.2	• Develops flexible plans for complex, high-impact activities with strategic implications, involving a diverse range of stakeholders with potentially competing demands • 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 • Monitors outcomes of decisions, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable to future situations

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Unit Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
BSBPMG609 Direct procurement and contracting for a project program	BSBPMG609A Direct procurement and contracting for a project program	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

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Assessment Requirements for BSBPMG609 Direct procurement and contracting for a project program

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:

- direct planning for project contracting and procurement, including:
  - directing identification of product specifications and procurement requirements
  - directing development of procurement strategies, methods and management plans
- direct set up of contract and procurement process, including:
  - directing project managers to source suitable organisations
  - establishing selection processes and selection criteria
  - ensuring contract and procurement actions accord with objectives
- direct management of contract and procurement process, including:
  - providing direction for identifying and arranging communication of proposal requirements
  - ensuring responses are evaluated and preferred contractors selected
  - directing negotiation of contract terms and conditions
- direct management of contracts, including:
  - directing management of contract and procurement
  - providing direction for regular reviews
  - ensuring project managers work within legal and organisational framework
  - identifying and approving remedial actions for potential, perceived and actual contractual conflicts
- direct finalisation of contracts, including:
  - directing finalisation activities for management of contract deliverables
  - directing review and analysis of project outcomes
  - aggregating and using lessons learnt.

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

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Knowledge Evidence

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

- explain contract management and legal obligations of both parties
- describe procurement processes and options.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Project Management field of work and include access to:

- workplace contractual and procurement documentation
- feedback from project team and stakeholders as to how procurement and contractual processes were handled.

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

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BSBPMG610 Enable program execution

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 parameters and enable a program to be undertaken effectively. It includes the performance criteria required to demonstrate competency in establishing both what the program will accomplish and how it will do so.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Envision the desired future state	1.1 Define and agree description of the desired future state with pertinent stakeholders 1.2 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the desired future state 1.3 Periodically review the description of the desired future state and confirmed or updated to maintain alignment with the expected benefits
2. Shape and sustain the program execution approach	2.1 Define and agree gaps between the current state and the desired future state with pertinent stakeholders 2.2 Define and agree changes needed to move from the current state to the desired future state with pertinent stakeholders 2.3 Define and agree a program execution approach based on changes needed with pertinent stakeholders 2.4 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the program execution approach 2.5 Periodically review program execution approach and confirm or update to maintain alignment with the expected benefits
3. Shape and sustain the program's business case	3.1 Define, document, and approve business case for both the desired future state and the program execution approach with pertinent stakeholders 3.2 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the program's business case 3.3 Periodically review the program's business case and confirm or update to maintain alignment with the expected benefits
4. Shape and sustain program governance	4.1 Define, maintain and refresh the program organisation with the sponsoring organisation 4.2 Design program boundaries and governance structures to exploit synergies with the sponsoring organisation 4.3 Identify / devise policies, processes, and procedures to support the management of the program and communicate with pertinent stakeholders

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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, 2.4, 3.2, 3.3, 4.3	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.3, 2.1, 2.2, 2.3, 2.5, 3.1, 3.3, 4.1, 4.2, 4.3	• Develops and refines a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.3, 2.1, 2.2, 2.3, 2.5, 3.1, 3.3, 4.1, 4.3	• 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
Navigate the world of work	4.2, 4.3	• Contributes to the development of organisational policies and procedures
Interact with others	1.1, 1.3, 2.1, 2.2, 2.3, 2.5, 3.1, 3.3, 4.1, 4.3	• Selects and uses appropriate conventions and protocols when communicating with relevant stakeholders to seek or share information • Negotiates agreement with diverse stakeholders
Get the work done	1.2, 2.4, 3.1, 3.2, 4.1, 4.2	• 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

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG610 Enable program execution	Not applicable	New unit	No equivalent unit

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Links

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

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Assessment Requirements for BSBPMG610 Enable program execution

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:

- 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
- apply policy development skills to structure, revise and document various policies
- create, negotiate and document a program future state model
- develop and document a program execution strategy, governance model and business case.

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 methods used to construct future state scenarios
- explain business case development processes, documentation and presentation
- explain program execution approaches
- identify program governance models.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- examples of program documentation

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- feedback from stakeholders, which reflects how program execution was managed for a program.

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

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BSBPMG611 Facilitate stakeholder engagement

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 facilitate stakeholder engagement in a program. It includes the performance criteria required to demonstrate competency in working with stakeholders to achieve desired program benefits.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Communicate effectively with stakeholders	1.1 Identify and document program stakeholders and their communication needs 1.2 Agree communication approaches with pertinent stakeholders 1.3 Share information as planned and address identified variances 1.4 Monitor communication interfaces among constituent projects
2. Facilitate stakeholder commitment	2.1 Investigate, document, and consider the interests and expectations of pertinent stakeholders when making program decisions 2.2 Develop and implement approaches to influence ongoing stakeholder commitment 2.3 Accommodate differing stakeholder interests and expectations 2.4 Share evolving stakeholder interests and expectations across the program

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, 2.1	• Organises, evaluates and critiques ideas and information from complex texts
Writing	1.1, 2.1, 2.2	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.2, 2.1	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Interact with others	1.2, 1.3, 2.1, 2.2, 2.3, 2.4	• Recognises 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 • Actively identifies, creates and utilises linkages to enhance knowledge sharing and commitment

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Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.4	• Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands • Identifies issues and uses analytical techniques to generate and evaluate possible solutions and to make decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG611 Facilitate stakeholder engagement	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

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Assessment Requirements for BSBPMG611 Facilitate stakeholder engagement

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 analytical skills to identify and interpret stakeholder interests and expectations
- incorporate inclusive integration skills
- apply workplace communication skills to work with stakeholders effectively
- provide workplace based examples of stakeholder communications, both formal and informal
- demonstrate use of different communication approaches in different stakeholder contexts.

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 engagement models, benefits and applications
- compare forms and methods of stakeholder engagement
- utilise means, media and methods of communication
- document types and role of program stakeholders.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to examples of program stakeholder engagement processes and interaction
- feedback from stakeholders, which reflects how stakeholder engagement was managed for a program.

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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

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BSBPMG612 Implement program governance

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 governance requirements to ensure effective program management. It includes the performance criteria required to demonstrate competency in implementing systems and processes for decision-making, management systems, compliance and support.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1. Facilitate effective decision making	1.1 Negotiate clear roles and responsibilities within the program and make available to all relevant stakeholders 1.2 Allocate unambiguous financial and resource authorities and confirm with relevant parties 1.3 Document decisions relevant to the program objectives 1.4 Make valid and reliable decisions regarding complex priorities and competing demands using repeatable methods
2. Implement systems and methods	2.1 Align suitable systems and processes to meet program objectives 2.2 Implement effective management control systems to monitor program progress 2.3 Generate audit and configuration information and maintain documented integrity 2.4 Establish process efficiency and support it with suitable program policy
3. Ensure program compliance	3.1 Identify both organisation and external compliance requirements relevant to the program 3.2 Establish audit records data collections and ensure records are securely maintained 3.3 Report on compliance within regular interval to relevant authorities 3.4 Identify and implement actions to rectify non-compliant behaviours, processes and products
4. Enable program support services	4.1 Identify management and governance support needs for the program 4.2 Establish skill development support systems for program personnel to meet program needs 4.3 Implement program knowledge management to support current and future organisation requirements for program development

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.3, 2.1, 2.3, 4.1	• Identifies, analyses and interprets information in organisational and project documentation
Writing	1.2, 1.3, 2.1, 2.3, 2.4, 3.2, 3.3, 4.1	• Develops a range of project related documents using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.2	• Participates in verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	3.1, 4.1	• Understands and adheres to organisational policies and external compliance requirements
Interact with others	1.1, 1.2	• Selects and uses appropriate practices when communicating with relevant stakeholders to seek or share information
Get the work done	1.4, 2.2, 2.4, 3.2, 3.4, 4.1, 4.2, 4.3	• Plans, organises and implements systems and processes to support overall program objectives • Uses systematic, analytical processes to gather and evaluate the information needed to make decisions • Generates, manages and maintains records securely and in required format

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG612 Implement program governance	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

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Assessment Requirements for BSBPMG612 Implement program governance

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:

- document program role and responsibilities
- determine finance and resource authorities
- 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.

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 use and purpose of program controls
- list audit and/or compliance requirements for a program
- outline a plan to rectify program compliance problems
- explain the use of decision making processes in the program context
- describe a team skills support approach for a program.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation relevant to program governance

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- feedback from stakeholders, which reflects how program governance was implemented for a program.

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

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BSBPMG613 Manage benefits

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 the attainment of program benefits. It includes the performance criteria required to demonstrate competency in ensuring that benefits are realised when and as expected.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Identify benefits and trade-offs	1.1 Define and communicate expected short- and long-term benefits and trade-offs with pertinent stakeholders 1.2 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the expected benefits 1.3 Periodically review expected benefits and trade-offs and confirm or update
2. Shape and sustain benefits delivery approach	2.1 Define and agree benefits measurement approach with pertinent stakeholders 2.2 Devise and agree benefits delivery approach with pertinent stakeholders 2.3 Assign and have accepted ownership of benefits delivery 2.4 Periodically review, confirm and update benefits measurement approach and benefits delivery approach
3. Evaluate attainment of expected benefits	3.1 Assess deliverables from constituent projects in accordance with the benefits measurement approach 3.2 Measure and report progress toward delivery of expected benefits with pertinent stakeholders 3.3 Address variances in delivery of expected benefits

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, 2.4, 3.1	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2	• Prepares documentation to confirm and report on defined benefits and reviews using appropriate format, vocabulary and structure
Oral Communication	1.1, 1.3, 2.1, 2.2, 2.3, 2.4, 3.2	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding

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Numeracy	3.1, 3.2	• Calculates, compares and contrasts outcomes against targets using appropriate mathematical formulae
Interact with others	1.1, 1.3, 2.1, 2.2, 2.3	• Selects and uses appropriate conventions and protocols when communicating with relevant stakeholders to share information
Get the work done	1.1, 1.2, 1.3, 2.3, 2.4, 3.1, 3.2, 3.3	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG613 Manage benefits	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

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Assessment Requirements for BSBPMG613 Manage benefits

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 analytical skills to identify and articulate program benefits
- prioritise benefits using decision making skills
- use evaluation skills to measure and assess program benefits performance
- negotiate agreed approaches with stakeholders.

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:

- compare benefit delivery models
- explain decision making theory and analysis applied to benefits assessment
- list types and definition of program benefits
- explain workplace identification and documentation of program benefits
- explain the relationship between program delivery and benefits realisation approaches
- review and evaluate a program benefits realisation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- 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.

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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

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BSBPMG614 Engage in collaborative alliances

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 enable a program to engage in collaborative alliances. It includes the performance criteria required to demonstrate competency in 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. However, collaborative alliances are often formalised with the use of a legally binding contract. Collaborative agreements often involve organisations that are part of the same legal entity; business units of the same corporation or departments of the same government.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

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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. Cultivate collaborative alliances	1.1 Identify and evaluate opportunities for collaborative alliances 1.2 Identify and evaluate potential collaborators 1.3 Initiate and shape relationships with potential collaborators
2. Devise and elaborate collaborative agreements	2.1 Initiate, negotiate, agree and document a collaborative agreement approach with parties to the agreement 2.2 Sign and regularly review each formal agreement to ensure continuation of envisaged value and potential need for changes and additions 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 to sustain commitment 3.2 Assess performance of all parties to an agreement against expected results and address variances 3.3 Make changes to agreements 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.2, 3.2	• Identifies and interprets information from a range of sources
Writing	2.1, 2.2, 2.3, 3.2, 3.3	• Prepares and modifies agreements and plans using appropriate language and format
Oral Communication	1.3, 2.1, 3.1	• Participates in verbal exchanges using language and features appropriate to the audience • Uses active listening and questioning techniques to confirm understanding
Interact with	1.3, 2.1, 3.1	• Uses interpersonal skills to negotiate agreements with diverse stakeholders

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others		• Invests time and energy in building and maintaining effective working relationships
Get the work done	1.1, 1.2, 2.2, 3.1, 3.2	• Plans, implements and monitors tasks and activities required to achieve collaborative alliance goals • Analyses and evaluates options to make decisions about possible alliances • Evaluates outcomes to identify improvement opportunities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG614 Engage in collaborative alliances	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

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Assessment Requirements for BSBPMG614 Engage in collaborative alliances

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:

- implement communication and network skills to assist engaging potential collaborators
- demonstrate environment scanning techniques to identify opportunities for collaboration
- conduct negotiations to devise and agree collaboration arrangements
- demonstrate written and literacy skills to document agreements.

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 methods to maintain and sustain alliances
- compare alternate negotiating strategies
- discuss summary profiles of collaborators
- list types and forms of collaboration agreements
- explain types and forms of collaborative alliances.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation regarding collaborative alliances
- feedback from stakeholders, which reflects how collaborative alliances were managed for a program.

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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

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BSBPMG615 Manage program delivery

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 program delivery. It includes the performance criteria required to demonstrate competency in ensuring that the program is moving toward the accomplishment of its vision and the attainment of its expected benefits.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Secure program funding	1.1 Determine, document and communicate ongoing funding requirements with pertinent stakeholders 1.2 Secure funding commitments as needed 1.3 Address funding issues 1.4 Satisfy funding agent requirements
2. Resource the program	2.1 Determine, negotiate, document and communicate program resource requirements with pertinent stakeholders 2.2 Acquire and coordinate program resources across the program and its constituent projects 2.3 Confirm and update program resource requirements in response to program refinements or changes
3. Measure, evaluate, and coordinate program progress	3.1 Establish monitoring and control systems 3.2 Support delivery of expected benefits with monitoring and control systems 3.3 Report performance of constituent projects and other program elements to pertinent stakeholders 3.4 Maintain a sustainable pace to meet stakeholder requirements
4. Ensure relevant legal and regulatory requirements are addressed	4.1 Identify, document and communicate relevant legal and regulatory requirements to pertinent stakeholders 4.2 Identify and address potential for conflicts caused by legal and regulatory requirements 4.3 Implement compliance policies, processes, and procedures 4.4 Monitor breaches and conflicts of applicable legal and regulatory requirements
5. Anticipate and respond to changes	5.1 Monitor and evaluate internal and external program contexts for circumstances that may require changes 5.2 Identify, evaluate and document actual and potential changes 5.3 Implement approved changes 5.4 Communicate changes and their implications with pertinent stakeholders
6. Manage program risks	6.1 Document and communicate agreed risk management approach for the program and its constituent projects to pertinent stakeholders 6.2 Identify program risks in consultation with pertinent

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ELEMENT	PERFORMANCE CRITERIA
	stakeholders 6.3 Analyse, prioritise and implement program risks and risk responses as planned 6.4 Monitor internal and external program contexts for circumstances that may affect program risks

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, 2.3, 4.1, 4.3, 4.4, 5.1, 5.2, 6.4	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 2.1, 2.3, 3.3, 4.1, 5.2, 5.4, 6.1, 6.2	• Records results of negotiations clearly and accurately • Creates and updates program documentation using organisational formats and appropriate vocabulary
Oral Communication	1.1, 2.1, 3.3, 4.1, 5.4, 6.1, 6.2	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.1, 1.3, 2.3	• Makes basic mathematical calculations to determine program funding and resource requirements
Navigate the world of work	3.2, 4.1, 4.2, 4.3, 4.4	• Monitors adherence to both explicit and implicit organisational policies and protocols and legislative or regulatory requirements
Interact with others	1.1, 1.2, 2.1, 3.3, 4.1, 5.3, 5.4, 6.1, 6.2	• Selects and uses appropriate conventions and protocols to communicate with relevant stakeholders to share information • Collaborates with others to achieve required outcomes, playing a leading role in facilitating effective interaction, influencing direction and negotiating agreement
Get the work done	1.2, 1.3, 1.4, 2.1, 2.2, 3.1, 3.4, 4.2, 5.1, 5.2, 5.3, 6.3, 6.4	• Develops flexible plans for complex, high impact activities with strategic implications that involve diverse stakeholders • Sequences and schedules complex activities, monitors implementation and manages program evaluation

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		• Makes critical and non-critical decisions in relatively complex situations, taking a range of factors into account

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG615 Manage program delivery	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

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Assessment Requirements for BSBPMG615 Manage program delivery

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:

- demonstrate analytical skills to assess program progress
- use communication skills to work with stakeholders effectively
- implement environment and performance evaluation skills to monitor and respond to changed circumstances
- apply evaluation and review skills to assess program risks
- conduct negotiations to resource and fund the program
- use software and data analysis methods to structure program data
- prepare a program risk management 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:

- compare evaluation and moderation methods applied to program management
- identify legislation and regulation related to the program context
- document program and project resource types, characteristics and supply
- explain program funding models
- prepare model for risk management standards and methodology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

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- access to workplace documentation for the management of program delivery
- feedback from stakeholders, which reflects on how a program was delivered.

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

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BSBPMG616 Manage program risk

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 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.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

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. Direct planning of program risk management	1.1 Select and modify the program risk methodology to match the context for risk 1.2 Direct identification, documentation and analysis of program

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ELEMENT	PERFORMANCE CRITERIA
	level risks, in consultation with stakeholders, as the basis for project risk-management planning 1.3 Direct, support and mentor project managers in the analysis, evaluation and treatment of risks 1.4 Ensure risk management is visible and dynamic across the program so that risks are assigned and managed in a timely manner 1.5 Develop and maintain a program risk-management system to enable 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 Ensure risks are monitored and assessed across the program at agreed intervals 2.4 Direct response to actuated program risk (issues) and ensure remedial actions are authorised with impact analysis, to achieve program objectives
3. Assess program risk-management outcomes	3.1 Identify and document program residual risk to alert stakeholders of any transferred liability at program completion 3.2 Review and analyse program outcomes to assess the effectiveness of the risk-management methodology 3.3 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	Performance Criteria	Description
Reading	1.1, 3.3	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 3.1, 3.3	• Documents results of consultations clearly and accurately to inform risk-management planning

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		• Documents risk-management outcomes using format and terminology appropriate to the audience
Oral Communication	1.2, 1.3, 2.1, 2.4	• 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
Interact with others	1.2, 1.3, 2.1, 2.4	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
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	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG616 Manage program risk	BSBPMG608A Direct risk management of a project program	Updated to meet Standards for Training Packages. Name changed to reflect industry practice. Edits and additions to performance criteria for elements 1, 2 and 3.	No equivalent unit

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Links

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Assessment Requirements for BSBPMG616 Manage program risk

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:

- direct the planning of program risk management, including:
  - assessment and selection of 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
  - ensuring risk management is visible and timely
  - developing and maintaining a risk management system across the program
- manage program risk, including:
  - managing the program in accordance with plans
  - reviewing progress, analysing variance and initiating risk responses
  - ensuring risks are assigned and monitored across the program at agreed intervals
  - issues are assessed for impact and remedial actions authorised
- 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 effectively to risk within complex programs that are subject to unpredictable contextual pressures.

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 use of risk management tools, frameworks, systems, methodologies and standards

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- explain the use of a dynamic risk register across a program.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- workplace risk management documentation
- feedback from program stakeholders as to how risks were managed.

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

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BSBPMG617 Provide leadership for the program

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 leadership for the program. It includes the performance criteria required to demonstrate competency in motivating and inspiring individuals and organisations to work constructively toward attainment of program benefits.

A program is defined as a set of interrelated projects, each of which has a project manager. 'Multiple projects', or 'a program of projects', refers to a number of related projects managed by the same person as a program to achieve organisational objective/s.

It 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

Management and Leadership – Project Management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Promote the program vision	1.1 Maintain alignment of the program vision with the sponsoring organisation mission and values 1.2 Conduct ongoing negotiations with stakeholders to maintain program vision 1.3 Demonstrate commitment to the program vision
2. Build an environment of confidence and trust within the program	2.1 Treat stakeholders fairly and equitably 2.2 Encourage and facilitate open discussion 2.3 Manage differences constructively 2.4 Attend to issues and concerns in a timely manner 2.5 Choose and apply interpersonal and leadership styles based on the circumstances 2.6 Honour realistic personal commitments
3. Embed socially responsible practice into the program	3.1 Communicate explicit expectations for socially responsible practice to constituent projects and other pertinent stakeholders 3.2 Design policies and procedures to allow individuals to safely report breaches of socially responsible practice without fear of retaliation 3.3 Identify and address threats to socially responsible practice within the program
4. Develop the potential of program staff	4.1 Establish individual behavioural expectations for constituent project managers 4.2 Define, document and communicate agreed individual program roles 4.3 Encourage desirable behaviours and discourage undesirable behaviours
5. Support a learning environment	5.1 View program planning and program plan implementation as a learning process 5.2 Treat errors, mistakes and expressed concerns as learning opportunities 5.3 Develop and maintain plans for identifying, capturing, disseminating and exchanging knowledge 5.4 Implement program knowledge as planned 5.5 Encourage reflection on and review of practice as a basis for learning

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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	5.1, 5.2, 5.3, 5.4, 5.5	• Uses feedback to grow and develop own skills and experience and applies practical strategies to facilitate learning
Reading	1.1, 4.2	• Applies appropriate strategies to construct meaning from complex texts
Writing	3.2, 4.2, 5.3	• Develops and updates roles and plans using language and structure to suit the audience • Designs and develops documents according to organisational formats
Oral Communication	1.2, 2.2, 3.1, 4.2	• 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
Navigate the world of work	1.1, 1.2, 1.3, 3.2	• Contributes to the design of organisational policies and protocols that support the organisation's goals • Understands responsibilities of own role and its contribution to broader goals of the work environment
Interact with others	1.2, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.1, 4.1, 4.2, 4.3, 5.5	• Selects and uses appropriate conventions and protocols when communicating with stakeholders to share information • Encourages a collaborative culture within own sphere of influence, investing time in building and maintaining effective working relationships and facilitating respect and commitment between stakeholders • Fosters a climate where individual differences are respected and valued • Understands the importance of honouring own obligations
Get the work done	2.3, 2.4, 3.3, 5.3, 5.4	• Organises and implements tasks required to action knowledge management plans • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account • Identifies issues, and used problem-solving skills to evaluate options and decide on appropriate actions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG617 Provide leadership for the program	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

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Assessment Requirements for BSBPMG617 Provide leadership for the program

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:

- display effective communication skills to liaise with stakeholders
- demonstrate ethical behaviour
- model leadership skills to lead a program
- negotiate a program vision with others
- lead a program to develop and sustain the documented program vision
- embed confidence, trust, ethical and sustainable practices in an enterprise program
- develop and support personnel within the program environment
- design knowledge management methods and 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:

- compare behavioural models for the role of program manager
- explain communication and negotiating styles and approaches
- describe current ethics, equity and fairness norms, regulations and legislation
- list learning and development methods and strategy
- compare types and formats for program vision.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

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- workplace documentation regarding program leadership
- feedback from stakeholders, which reflects how program leadership was implemented for a program.

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

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BSBPMG801 Prioritise projects and programs

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 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.

It 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

Management and Leadership – Project Management

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. Identify projects and programs	1.1 Undertake a regular census to identify and capture all ideas, proposed, planned, active or inactive projects and programs in the

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ELEMENT	PERFORMANCE CRITERIA
	organisation, the project sponsor and their project approval status 1.2 Capture macro-level project and program information for every project and program within the project portfolio 1.3 Implement ongoing identification and capture of project and program information using formalised tools and processes that are agreed to with executive management
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 to determine the degree of alignment with, and contribution to, one or more strategic objective 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 to reflect changing organisational priorities 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	Performance Criteria	Description
Reading	1.1, 1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.3	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3	• Documents results of census using required organisational formats • Develops and documents analysis of project prioritisation using appropriate organisational formats and project management vocabulary

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Oral Communication	1.1, 1.3, 3.2	• Participates in discussions using language and features appropriate to the audience • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	2.1, 2.2, 2.3, 2.4, 2.5, 3.1	• Understands how own role contributes to the broader goals of the organisation, and uses this to inform planning
Interact with others	1.1, 1.3, 3.2	• Plays a lead role in situations requiring effective collaboration and high-level negotiation skills
Get the work done	1.1, 1.2, 1.3, 2.1, 2.4, 2.5, 3.1, 3.3	• Sequences and schedules complex activities with an understanding of how they contribute to broader organisational goals • Systematically gathers and analyses all relevant information and evaluates options to inform decisions about strategic alignment

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG801 Prioritise projects and programs	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

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Assessment Requirements for BSBPMG801 Prioritise projects and programs

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 a program and project register that demonstrates links with organisational objectives or is categorised based on the organisation's schema integrate strategic plans listing aligned projects and programs
- apply auditing methodologies and outputs for establishing project and program status
- 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.

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 how information on projects and programs are captured and collated
- explain how each respective project and program is assigned a priority and category
- identify the level of detail captured on each project and program and explain how it is recorded and managed
- define the steps in an organisational prioritisation method
- explain how the projects and programs are reviewed and the decision making process used to determine their alignment to various strategic themes
- provide examples of how internal and external environmental factors are taken into account.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how prioritisation was managed for a portfolio.

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

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BSBPMG802 Select and balance the portfolio

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 select and balance a portfolio. It covers the screening of projects and programs, undertaking investment appraisal, selection and gaining approval 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.

It 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

Management and Leadership – Project Management

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. Undertake screening	1.1 Review business case for each project/program to capture interfaces, emergent risks, resource requirements, business benefits

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ELEMENT	PERFORMANCE CRITERIA
	and their timings 1.2 Determine business benefits to be achieved by mapping dependencies between projects and programs 1.3 Identify and add mandatory projects and programs to the project portfolio, where appropriate
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 to remove duplication and take advantage of synergies 2.3 Commission feasibility studies in instances where additional analysis is required to determine investment merit 2.4 Undertake a comparative analysis to determine the most appropriate projects and programs to receive organisational investment 2.5 Determine the budget or financial profile for each project or program 2.6 Group related projects for management as a program to ensure relevant efficiencies are captured
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 regularly to calibrate the project selection model 3.3 Select projects and programs for inclusion in the portfolio based on the organisation's project selection model 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 on a regular basis 4.2 Make recommendations to executive management as to the projects to be included in the portfolio 4.3 Facilitate the approval of projects/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 4.6 Identify rejected, cancelled or on-hold projects and programs

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ELEMENT	PERFORMANCE CRITERIA
	with reasons for rejection 4.7 Cancel or put on hold those projects and programs currently underway that have been rejected from the portfolio 4.8 Communicate a list of approved and rejected projects and programs to stakeholders

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, 2.4, 2.5, 2.6, 3.1, 3.2, 4.4, 4.6, 4.7	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 1.3, 2.2, 2.3, 2.4, 2.6, 3.2, 3.4, 4.2, 4.4, 4.6, 4.7, 4.8	• Documents results of screening and selection processes • Develops documents to communicate results of selection process using appropriate formats and vocabulary
Oral Communication	2.3, 3.4, 4.2	• Presents information using language and features appropriate to the audience • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.1, 2.4, 2.5	• Interprets numerical data to determine resource requirements, budgetary needs and funding possibilities
Navigate the world of work	3.2, 3.3	• Understands the relationship between immediate tasks and the broader goals of the organisation, and uses this to inform decision-making
Interact with others	2.3, 3.4, 4.2, 4.8	• Selects and uses appropriate communication practices to provide information or commission feasibility studies • Plays a lead role in situations requiring effective collaboration and high-level influencing and negotiation skills
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.6, 3.1,	• Develops and implements flexible plans for complex, high impact activities with organisational implications

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	3.3, 3.4, 4.1, 4.3, 4.4, 4.5, 4.6, 4.7	• Sequences and schedules activities to achieve planned outcomes • Uses analytical processes to evaluate information and decide on most appropriate options

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG802 Select and balance the portfolio	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

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Assessment Requirements for BSBPMG802 Select and balance the portfolio

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:

- 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
- demonstrate representing multi-dimensional and complex information in creative ways including:
  - bubble charts
  - three-dimensional graphs
  - balanced score-card matrix
  - pair-wise comparison.

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 criterion prioritisation models
- summarise supply and demand concepts

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- compare methods to determine organisational human resources capacity
- explain the structure and use of business cases and feasibility studies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how selection and balance across the portfolio was achieved.

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

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BSBPMG803 Manage and review portfolio performance

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 effectively manage and review a portfolio. It covers project and program oversight, continuous improvement across the portfolio and benefits 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.

It 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

Management and Leadership – Project Management

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. Program and project delivery oversight	1.1 Align the portfolio review cycle with appropriate project/program review points

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ELEMENT	PERFORMANCE CRITERIA
	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 to ensure that projects/programs are meeting their identified key 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/programs included in the portfolio
2. Portfolio continuous improvement	2.1 Continuously review and improve project identification and approval 2.2 Assess portfolio value and contribution to strategic priorities regularly through the monitoring and review of key performance indicator measures 2.3 Feed 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 Actively manage the portfolio to maximise achievement of organisational benefits

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	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 3.1	• Documents results of reviews using appropriate organisational formats • Prepares documents to support portfolio management using format and vocabulary suitable to audience
Oral Communication	1.5	• Provides information using language and features appropriate to audience

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Numeracy	1.2, 2.2	• Interprets quantifiable data to effectively manage and review portfolios
Navigate the world of work	2.2	• Understands the relationship between immediate tasks and organisational strategic objectives, and uses this to inform assessments
Interact with others	1.5	• Selects and uses appropriate communication methods and practices to provide recommendations
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.1, 3.2	• 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 • Evaluates outcomes to identify process improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG803 Manage and review portfolio performance	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

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Assessment Requirements for BSBPMG803 Manage and review portfolio performance

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 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 effectively to signs and symptoms of project/program failure and underperformance.

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 portfolio review matrix
- explain the cross project/program dependency map
- describe the use of the portfolio review document
- explain the project/program performance report or audit
- explain use of the portfolio delivery map.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects on how portfolio performance was reviewed.

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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

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BSBPMG804 Govern the portfolio

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 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.

It 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

Management and Leadership – Project Management

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. Apply standards, models and approach	1.1 Incorporate legislative, regulatory or business requirements and changes into portfolio management decisions and controls 1.2 Apply disciplined governance arrangements, supported by

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ELEMENT	PERFORMANCE CRITERIA
	appropriate methods and controls, to projects and programs within the portfolio 1.3 Implement a supportive and coherent relationship between business strategy and project portfolio 1.4 Ensure that all projects/programs within the portfolio have an approved plan containing authorisation points at which the business case is reviewed and approved on an ongoing basis to determine the continued validity of investment, organisational exposure and return 1.5 Record and communicate decisions made at authorisation points 1.6 Ensure members of delegated authorisation bodies have sufficient representation, competence, authority and resources to enable them to make appropriate decisions 1.7 Support executive management to ensure appropriate independent assurance of projects/programs occurs 1.8 Clearly define criteria for reporting project status and for the escalation of risks and issues to the levels required by the organisation 1.9 Foster trust by engaging portfolio stakeholders at a level that is commensurate with their importance to the organisation
2. Develop the portfolio charter	2.1 Prepare and regularly review a portfolio charter, which clearly establishes portfolio governance and management roles, authorities, approval limits, responsibilities and the scope of portfolio control

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	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.5, 1.8, 2.1	• Develops governance documentation using organisational formats and vocabulary suitable for the audience • Records results of decisions using format and

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		vocabulary suitable for the audience
Oral Communication	1.5	• Shares information using language and features appropriate to the audience
Navigate the world of work	1.1, 1.2, 1.3, 1.8	• Understands and adheres to organisational, legal and regulatory requirements
Interact with others	1.5, 1.7, 1.9	• Selects and uses appropriate communication methods and practices to provide recommendations • Invests time in building and maintaining effective and trusting relationships within immediate work context
Get the work done	1.1, 1.2, 1.3, 1.4, 1.6, 1.8, 2.1	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG804 Govern the portfolio	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

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Assessment Requirements for BSBPMG804 Govern the portfolio

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:

- preparing a portfolio charter
- applying a decision making matrix with suitable criteria
- determining a suitable governance model to a portfolio context
- defining suitable decision making authorities and delegations
- preparing governance documentation and reports.

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 governance mechanisms established in the portfolio
- describe the link between portfolio governance mechanisms and those used in projects/programs
- explain suitable methods to communicate the governance requirements to subordinates
- explain how portfolio decisions are made and supported
- identify and describe project, program and corporate governance models.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how governance was managed within a portfolio.

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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

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BSBPMG805 Lead the portfolio

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 portfolio. It covers the providing 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.

It 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

Management and Leadership – Project Management

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. Lead the portfolio team	1.1 Champion portfolio management within the organisation 1.2 Justify portfolio management resourcing regularly, and

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ELEMENT	PERFORMANCE CRITERIA
	quantify and communicate the associated value provided to the business 1.3 Brief and support project/program sponsors throughout the project/program lifecycles 1.4 Assess performance of portfolio management office staff regularly and provide feedback 1.5 Influence internal and external stakeholders
2. Make strategic decisions	2.1 Establish a portfolio vision including a strategic plan, vision statement, charter and business plan 2.2 Communicate the portfolio vision to stakeholders 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	Performance Criteria	Description
Reading	1.2, 1.4, 2.1	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 1.3, 1.4, 2.1, 2.2	• 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	1.2, 1.3, 1.4, 1.5, 2.1, 2.2	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Numeracy	1.2	• Interprets quantifiable data to effectively justify financial benefits to business
Navigate the world of work	2.1, 2.2	• Understands and adheres to organisational requirements and contributes to the broader goals of the organisation
Interact with others	1.1, 1.2, 1.3, 1.4, 1.5, 2.1, 2.2	• Selects and uses communication methods and practices appropriate to audience and context • Builds and maintains effective relationships within

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		immediate work context
Get the work done	1.1, 1.2, 1.3, 2.1	• Devises and implements plans to champion portfolio management • Reviews implementation activities at regular intervals to decide on further actions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG805 Lead the portfolio	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

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Assessment Requirements for BSBPMG805 Lead the portfolio

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 management support and direction to the portfolio team
- undertake staff performance reviews
- develop and communicate a portfolio vision
- act as a role model and portfolio champion 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 the application of team management techniques and strategies
- describe performance management within a team
- explain how a portfolio manager can champion the vision within an organisation
- summarise the development of a portfolio vision
- explain motivation and leadership theories.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how the portfolio was lead.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBPMG806 Manage portfolio communications and change

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 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.

It 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

Management and Leadership – Project Management

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. Apply portfolio metrics, measurement and	1.1 Develop and regularly review a portfolio communications strategy, for use by portfolio staff

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ELEMENT	PERFORMANCE CRITERIA
report	1.2 Use a portfolio management information system to dynamically capture and manage information on projects and programs that comprise the portfolio and their status 1.3 Ensure progress reports to executive management show achievement or non-achievement toward strategic objectives 1.4 Communicate project selection criteria and project selection model throughout the organisation 1.5 Integrate portfolio data collection processes and systems into organisational processes and systems
2. Undertake stakeholder engagement and management	2.1 Ensure the organisational strategic management planning team interacts with executive management 2.2 Ensure the ideal portfolio mix considers internal and external stakeholders needs 2.3 Ensure the organisation fosters a culture of continuous improvement and of open internal disclosure of appropriate portfolio information
3. Communicate portfolio review outcomes	3.1 Identify and communicate criteria to evaluate portfolio management success 3.2 Forward regular portfolio management reports containing strategic information of portfolio status and progress to key project stakeholders 3.3 Communicate projects selected for inclusion in and rejection from the portfolio along with the rationale for the decision

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	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.3, 1.4, 3.1, 3.3	• Develops strategies and supporting documentation using appropriate organisational formats and vocabulary • Drafts and develops written communications to stakeholders using structure and vocabulary

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		appropriate to the audience
Oral Communication	1.4, 3.1, 3.3	• Provides information using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	1.3	• Recognises contribution of own activities to the achievement of strategic objectives
Interact with others	1.3, 1.4, 2.1, 3.1, 3.3	• Selects and uses appropriate communication methods and practices to provide information to a range of stakeholders
Get the work done	1.1, 1.2, 1.5, 2.2, 2.3, 3.1, 3.2	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG806 Manage portfolio communications and change	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

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Assessment Requirements for BSBPMG806 Manage portfolio communications and change

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 communication using modes and techniques appropriate to the context
- 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.

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:

- provide examples of project, program and business level reporting
- explain the influence of organisational politics on portfolio performance
- explain the importance of negotiation and influencing skills
- explain the principles of change management as applied to a portfolio.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how communication and change was managed within a portfolio.

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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

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BSBPMG807 Manage portfolio resources

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 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.

It 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

Management and Leadership – Project Management

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. Assess portfolio resources capacity	1.1 Identify project and program resources based on resource forecasts

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Capture a baseline of existing and proposed resources 1.3 Review, identify and assess the resource capacity of the organisation is regularly 1.4 Develop, review and update a portfolio resource strategy based on the status of projects and programs in the portfolio, taking into account the organisations resource constraints
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 are 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 determine 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/program resource allocation and utilisation against plans 3.3 Identify and investigate resource gaps and conflicts, and take appropriate action to resolve the identified resource constraints, in alignment with organisational strategic priorities
4. Coordinate and prioritise resources	4.1 Coordinate cross-organisational resource assignment to support prioritised projects and programs, based on risk, quality and other requirements 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	Performance Criteria	Description

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Reading	1.1, 1.3, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.2, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	• Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning
Numeracy	1.1-1.4, 3.1, 3.2, 3.3, 4.1, 4.2	• Interprets numerical information to determine resource requirements, assignments and reallocations
Navigate the world of work	3.3	• Recognises the relationship of own activities to organisational strategic goals
Get the work done	1.1-1.4, 2.2, 2.4, 2.5, 3.1, 3.2, 3.3, 4.1, 4.2	• 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 • Uses problem-solving processes to identify and analyse program resource issues, and decide on appropriate response

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG807 Manage portfolio resources	Not applicable	New unit	Equivalent unit

Links

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

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Assessment Requirements for BSBPMG807 Manage portfolio resources

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 apply human resource planning within the portfolio context
- undertake skills assessment and identify solutions
- optimise human resource allocation across projects and programs
- prepare resource utilisation calculations from collection techniques.

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 human resource allocation models
- explain strategic human resource management approaches
- explain calculation and distribution based on supply and demand concepts
- summarise workforce planning methods
- outline the application of strategic resource management and planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include:

- access to workplace documentation
- feedback from stakeholders, which reflects how human resources were managed within the portfolio.

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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

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BSBPMG808 Manage portfolio risk

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 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.

It 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

Management and Leadership – Project Management

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. Identify portfolio risks	1.1 Establish and continuously review standards and procedures for portfolio risk management 1.2 Integrate the portfolio risk management approach with

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ELEMENT	PERFORMANCE CRITERIA
	organisational risk management systems and strategies 1.3 Undertake analysis to determine the organisations risk appetite 1.4 Seek input about risks from stakeholders, executive management and other specialists 1.5 Identify external and internal threats and opportunities and assess their impact on the portfolio
2. Analyse portfolio risks	2.1 Capture results from project and program risks analysis to determine overall portfolio risk profile and organisational exposure 2.2 Ensure that executive management determines the level of acceptable portfolio risk 2.3 Capture and review individual project/program risks on a regular basis to determine the potential impact on the organisation 2.4 Audit project and program risks regularly 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 Actively manage portfolio risks to minimise organisational impact

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, 2.3, 2.4	• Applies appropriate strategies to construct meaning from complex texts
Writing	1.1, 1.3, 1.4, 2.1, 2.3, 2.4	• Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning
Oral Communication	1.4	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Navigate the	1.1, 1.2	• Contributes to the development and review of procedures to align with organisational goals and

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world of work		values
Interact with others	1.4	• Selects and uses appropriate communication methods and practices to seek information from a range of stakeholders
Get the work done	1.1, 1.2, 1.3, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3	• 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 • Identifies opportunities for new ideas or approaches based on risk analysis

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPMG808 Manage portfolio risk	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

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Assessment Requirements for BSBPMG808 Manage portfolio risk

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:

- assess and examine risks at project/program level in the context of the portfolio
- identify and prioritise portfolio risks
- apply lessons learned from previous project/programs in portfolio planning
- analyse risks and opportunities
- communicate risk events, responses and results to stakeholders
- record identification and prioritisation of risk events
- develop risk management plans
- report on variance and recommend suitable action
- detail the conduct of risk reappraisal
- review the effectiveness of risk management processes, procedures, tools and recommendations
- document improvements and risk management lessons learned.

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 risk management theory
- list potential risk events
- identify Australian and international risk management standards
- explain 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

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  - risk categorisation
  - risk urgency assessment
- explain enterprise risk management approaches.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

- workplace documentation
- feedback from stakeholders, which reflects how risk was managed for a portfolio.

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

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BSBPRO301 Recommend products 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 provide advice and information within an organisation about the development and distribution of its products and services.

It applies to individuals who apply a broad range of administrative competencies in varied work contexts, using some discretion and judgement and who may 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

Industry Capability – Product Skills and Advice

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. Develop and maintain knowledge of products and services	1.1 Actively and regularly research knowledge and understanding of industry products and services using authoritative sources 1.2 Use available product and service documentation to identify and understand characteristics of products and services, and to make comparisons with other products and services 1.3 Accurately document and maintain information on products and services in a format consistent with organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Apply acquired knowledge to improve quality within personal work areas
2. Recommend products and services	2.1 Ensure that recommendations on products and services are in line with organisational requirements 2.2 Provide recommendations that emphasise product and service issues relevant to client needs 2.3 Ensure that evidence in support of recommendations is verifiable and presented in a suitable format 2.4 Structure recommendations to identify clear benefits to clients and the organisation
3. Advise on promotional activities	3.1 Provide advice that is clear, is supported by verifiable evidence and is compatible with organisational requirements 3.2 Ensure that promotional documentation and materials are appropriate to presentation of the organisation's products and services 3.3 Ensure that costs of promotional activities conform to budget resources 3.4 Estimate impact of promotional activities from verifiable customer feedback sources 3.5 Evaluate the benefits of promotional activities and incorporate in plans for future promotional activities

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, 3.4	• Interprets, understands and compares textual information about products and services from a range of sources
Writing	1.2, 1.3, 2.2, 2.3, 2.4, 3.1, 3.2, 3.5	• Uses clear and specific language to develop documents for different audiences in accordance with organisational requirements
Oral Communication	3.1	• Provides recommendations using language appropriate to the purpose and audience

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Numeracy	3.3, 3.4	• Extracts and evaluates meaning from data to calculate actual costs against budget and impact of promotional activities
Navigate the world of work	1.3, 1.4, 2.1, 3.1	• Understands and follows organisational policies and procedures relevant to own role
Get the work done	1.1-1.3, 2.1-2.4, 3.1, 3.2, 3.5	• Plans and implements tasks required to achieve required outcomes • Analyses information in order to decide on appropriate advice or recommendations • Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRO301 Recommend products and services	BSBPRO301A Recommend products 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

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Assessment Requirements for BSBPRO301 Recommend products 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:

- use appropriate sources to document accurate information about the organisation's products and services
- prepare and provide advice about products and services according to organisational requirements
- evaluate promotional activities including consideration of:
  - whether promotional materials meet organisational requirements
  - actual costs against budget
  - customer feedback.

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:

- list authoritative sources of information about the organisation's products and services
- outline the organisation's products and services
- outline the policies and procedures that apply when providing advice or recommendations about products and services
- list and describe organisational promotional activities
- explain methods used to gather verifiable customer feedback about products and services
- explain how and why customer feedback is analysed.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – product skills and advice field of work and include access to:

- relevant organisational policies and procedures
- relevant workplace documentation and resources
- 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

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BSBPRO401 Develop product knowledge

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 product knowledge in preparation for the sales process.

It applies to individuals who need to solve a defined range of unpredictable problems, analyse and evaluate information from a variety of sources and who may provide leadership and guidance to others with some limited responsibility for the output of others.

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

Unit Sector

Industry Capability – Product Skills and Advice

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. Acquire knowledge of products in a specified area	1.1 Identify information sources about products in a specified area and evaluate them for reliability and validity 1.2 Identify product purpose/s and use/s 1.3 Identify key features of the product/s 1.4 Identify product strengths and weaknesses 1.5 Articulate guarantees and warranties and identify service support details

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ELEMENT	PERFORMANCE CRITERIA
2. Convert product knowledge into benefits	2.1 Identify features of the product which have potential buyer appeal 2.2 Present features of the product which have buyer appeal as benefits to the buyer 2.3 Present product benefits within the context of organisational requirements and legislation
3. Evaluate competitors' products	3.1 Use a range of information sources to identify competitors' products 3.2 Compare features, benefits, strengths and weaknesses of competitors' products with own products 3.3 Establish relative standing of the organisation's product with the competitors' product/s and communicate differences to the buyer

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, 3.1, 3.2, 3.3	• Identifies, interprets, understands and compares information to monitor and evaluate quality of product and services and check against client requirements
Writing	1.1, 1.5, 2.2, 2.3, 3.2	• Records results of product evaluations to show clear comparisons of features, benefits and weaknesses • Uses clear and specific language to develop documents for different audiences in accordance with organisational requirements
Oral Communication	2.2, 2.3, 1.5, 3.3	• Provides recommendations using language appropriate to the purpose and audience
Numeracy	1.3, 1.4, 3.2, 3.3	• Analyses numerical information to measure, compare and evaluate features
Navigate the world of work	2.3	• Understands and follows organisational policies and procedures and legislative requirement relevant to own role
Get the work	1.1, 3.1, 3.3	• Plans and implements tasks required to achieve required outcomes

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done		• Analyses information to decide on appropriate recommendations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRO401 Develop product knowledge	BSBPRO401A Develop product knowledge	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

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Assessment Requirements for BSBPRO401 Develop product knowledge

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:

- use valid and reliable sources to gather information about the organisation's products and competitors' products
- determine buyer needs and present key features and benefits of product to match needs, in accordance with organisational and legislative obligations
- compare competitors' products with own organisation's products and communicate differences to buyer.

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:

- list sources of information for own organisation's products and competitors' products
- explain why it is important to discuss features, benefits, strengths and weaknesses when describing products
- summarise industry competitors, including products offered and potential buyer markets
- outline organisational policies and procedures, relevant to the sales process
- outline the key provisions of relevant legislation, regulations, standards and codes of practice that are relevant to the sales process.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – product skills and advice field of work and include access to:

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- information sources regarding an organisation's and competitors' products, service or ideas
- office equipment and resources
- relevant organisational policies and procedures
- 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

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BSBPUB401 Develop and apply knowledge of public relations industry

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 research, analyse and apply knowledge within public relations frameworks with due consideration to legal and ethical constraints and strategic communications management planning.

It applies to individuals who work in entry level positions with a general knowledge of the structure, organisation and function of the public relations industry. Individuals in this role may provide limited leadership and guidance to others.

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

Unit Sector

Business Development – Public Relations

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. Apply knowledge of the public relations industry	1.1 Seek information on the structure and operation of the public relations industry 1.2 Identify and access sources of information on the public relations industry 1.3 Obtain information on public relations industry sectors, associations, networks and societal role

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify and access information on key stakeholders 1.5 Apply industry information appropriately in everyday activities related to typical work roles
2. Identify industry employment obligations and opportunities	2.1 Obtain information regarding employment obligations and opportunities relevant to the public relations industry 2.2 Apply information on employment opportunities and obligations in everyday activities related to typical work roles
3. Conduct strategic communications management planning	3.1 Establish purpose and processes for setting organisation objectives 3.2 Identify and apply appropriate planning and measurement tools to organisation objectives 3.3 Develop critical success factors for the communications
4. Update industry knowledge	4.1 Conduct formal and informal research to update general knowledge of the industry continuously 4.2 Monitor current issues of concern to the industry 4.3 Share updated knowledge with client and colleagues 4.4 Incorporate updated knowledge into everyday activities related to typical work roles

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	• Identifies and evaluates information from external sources to assist in clarifying and extending knowledge
Reading	1.2-1.4, 2.1, 3.1, 3.2, 4.2	• Interprets business and market data from relevant sources to determine and adhere to requirements and procedures
Writing	3.1-3.3, 4.3	• Uses clear, accurate and relevant language to develop measurement tools and complete documentation in a range of styles for a range of audiences
Oral	1.1, 1.3, 1.4, 2.1, 4.3	• Clearly articulates instructions and information using relevant language suitable to diverse audiences

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Communication		• Employs listening and questioning techniques to clarify information and confirm understanding
Navigate the world of work	1.1, 1.2, 4.2	• Develops relevant skills and knowledge to remain up-to-date with current trends
Interact with others	4.3	• Fosters positive relationships with others and maintains open communication
Get the work done	1.5, 2.2, 3.1, 3.3, 4.4	• Prioritises and completes tasks within a set timeline • Recognises and applies new knowledge to the decision-making process

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPUB401 Develop and apply knowledge of public relations industry	BSBPUB401A Develop and apply knowledge of public relations 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBPUB401 Develop and apply knowledge of public relations industry

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:

- report on the public relations industry structure, its role in society and within particular organisations
- develop a stakeholder analysis relevant to particular organisations
- report on the current issues affecting the public relations industry.

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 current issues and trends which affect the public relations industry
- categorise industry structures and networks
- describe organisational and client operating environments, structures and business and marketing plans
- outline principles and practices of marketing communications and media strategies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and includes access to office equipment and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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BSBPUB402 Develop public relations campaigns

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 conduct a public relations campaign, to evaluate its effectiveness and to present the findings to stakeholders.

It applies to individuals in entry level or junior public relations roles who undertake the majority of work in creating and implementing the campaign with advice from more senior public relations specialists in their organisation.

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

Unit Sector

Business Development – Public Relations

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. Research public relations campaigns	1.1 Analyse strategic and operational plans to determine the scope, theme and objectives of a campaign 1.2 Conduct research into current practice and recent developments in relation to the campaign planning 1.3 Identify the campaign's audience and their attributes 1.4 Develop and present options to other members of the public relations team and relevant stakeholders for consideration

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ELEMENT	PERFORMANCE CRITERIA
2. Prepare to implement public relations campaigns	2.1 Define and agree upon campaign objectives and campaign plan with client and other key stakeholders 2.2 Schedule and cost campaign accurately and include in plans 2.3 Comply with legal and ethical constraints 2.4 Confirm roles and responsibilities with other members of the public relations team
3. Implement public relations campaigns	3.1 Implement public relations campaign in accordance with the plan 3.2 Evaluate the potential effectiveness and use of appropriate media to improve campaign publicity 3.3 Implement campaign in accordance with legal and ethical constraints and organisational requirements 3.4 Monitor campaign progress against scheduling and costing requirements and report likely variations for approval in accordance with organisational procedures 3.5 Gain agreement from stakeholders to any changes that need to be made to campaign
4. Review and evaluate public relations programs	4.1 Ensure campaign plans contain methods to monitor, review and evaluate their effectiveness 4.2 Report on the outcomes of the campaign to relevant internal and/or external stakeholders 4.3 Consult relevant internal or external stakeholders as to the campaign effectiveness, and document any 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	Performance Criteria	Description
Reading	1.1-1.3, 2.3, 3.1-3.4, 4.1	• Interprets complex information from relevant sources to develop and conduct a public relations campaign that complies with all legislative and regulatory requirements

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Writing	1.4, 2.1, 2.2, 2.4, 3.5, 4.1-4.3	• Uses clear, accurate and relevant language to develop reports and strategic material using style, language and format relevant to audience and context
Oral Communication	1.4, 2.1, 2.4, 3.5, 4.2, 4.3	• Communicates verbally using clear language to disseminate information to a variety of individuals • Uses active listening and questioning techniques to convey and clarify information
Numeracy	2.2, 3.4	• Interprets numerical information and performs simple calculations to cost a campaign within predetermined schedules
Navigate the world of work	1.1, 2.3, 3.3, 3.4	• Appreciates the implications of ethical, legal and regulatory responsibilities related to own work • Adheres to organisational policies and procedures
Interact with others	1.4, 2.1, 2.4, 3.5, 4.2, 4.3	• Recognises the 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 requiring joint effort
Get the work done	1.3, 2.2, 3.1-3.4, 4.1	• Plans, organises and implements tasks required to meet required outcomes • Makes routine decisions by implementing standard procedures • Recognises and takes responsibility for addressing predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPUB402 Develop public relations campaigns	BSBPUB402A Develop public relations campaigns	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

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Assessment Requirements for BSBPUB402 Develop public relations campaigns

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:

- research and present options for a public relations campaign for a target audience
- develop, implement, review and evaluate a public relations campaign about a product or service.

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 principles, practices and theories of marketing, media, and public relations.
- summarise current issues and trends which affect the public relations industry
- outline current practice and recent developments in campaign planning
- explain the relevance of the campaign's audience to campaign planning
- outline key provisions of relevant legislation, codes of practice and national standards that affect public relations campaigns.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- office equipment and resources
- case studies and, where possible, real situations.
- interaction with others.

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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

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BSBPUB403 Develop public relations documents

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 design, produce and edit public relations documents for various target audiences, and to evaluate their effectiveness in the marketplace.

It applies to individuals who would 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

Business Development – Public Relations

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. Research appropriate public relations documents	1.1 Research previous communication documents for tone, content and style 1.2 Research previous communication media and media distribution channels using appropriate methods 1.3 Research and analyse existing evaluation data 1.4 Conduct research about target public, clients or relevant

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ELEMENT	PERFORMANCE CRITERIA
	organisations
2. Plan production of communication document	2.1 Identify and segment the target public 2.2 Identify and agree upon communication objectives, messages and processes with other team members or supervisors in accordance with organisation procedures 2.3 Ensure communication message is aligned to the organisation's strategic objectives and operational plans 2.4 Identify and gain agreement on appropriate communication media and media channels to communicate message 2.5 Identify and agree upon processes to test the success of planned public relations communications 2.6 Determine outsourcing resources, and provide input into developing timelines and costs 2.7 Identify legal and ethical constraints impacting on communicating message
3. Create and edit public relations documents	3.1 Design and write communication documents which align with the organisation's objectives and effectively communicate issues, policies and practices of the organisation to target audiences 3.2 Scan documents to ensure compliance with legal and ethical requirements and proofread to identify and correct errors 3.3 Assess appropriateness of the style and tone of text for the target public and carry out structural editing to ensure the document flows logically 3.4 Edit the document to ensure its scope and format is in accordance with the organisation's strategic communications plan and complies with house style 3.5 Seek feedback from appropriate personnel on content of public relations documents following proofreading 3.6 Test document and amend it in response to feedback 3.7 Determine and agree upon modifications and incorporate into final draft
4. Implement and evaluate public relations documents	4.1 Forward any required document to outsourced resources within scheduled timelines 4.2 Distribute document in accordance with scheduled timelines using appropriate public relations publications to communicate and promote the goals of the organisation 4.3 Gather feedback and regularly monitor the effectiveness of

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ELEMENT	PERFORMANCE CRITERIA
	distributed documents using appropriate evaluation methods 4.4 Evaluate results of public relations documents against communication, organisation and/or client objectives 4.5 Record and file evaluation results and any improvement recommendations for future reference

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, 2.1-2.7, 3.1-3.6, 4.2-4.4	• 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	2.2, 2.4, 2.5, 3.1-3.7, 4.5	• 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	2.2, 2.4, 2.5, 3.5, 3.7, 4.3	• Articulates information clearly using language and features appropriate to the audience • Employs active listening and questioning techniques to clarify information and confirm understanding
Numeracy	2.6	• Interprets numerical information and makes basic calculations to determine outsourcing expenditure and workplace scheduling
Navigate the world of work	2.2, 2.3, 2.7, 3.1, 3.2, 4.2, 4.4	• Understands organisational goals and adheres to implicit and explicit organisation policies and procedures • Identifies the implications of ethical, legal and regulatory responsibilities related to own work
Interact with others	2.2, 2.4-2.6, 3.1, 3.5, 4.1-4.3	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Collaborates with others as part of familiar routine

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		activities
Get the work done	1.3, 2.1, 2.2, 2.4-2.7, 3.1, 3.2, 3.3, 3.4, 3.6, 3.7, 4.1-4.3, 4.5	• Takes responsibility for planning, sequencing and prioritising tasks and own workload to meet timelines and achieve outcomes • Analyses relevant information to make decisions directly related to role • Monitors outcomes, considering results from a range of perspectives, and identifies key concepts and principles that could be improved in future situations • Uses digital applications to record, store, retrieve and share documents

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPUB403 Develop public relations documents	BSBPUB403A Develop public relations documents	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

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Assessment Requirements for BSBPUB403 Develop public relations documents

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:

- research, design, develop, test, implement and evaluate a range of public relations documents intended to communicate different concepts to different audiences.

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 principles, practices and theories of marketing, media, and public relations.
- summarise current issues and trends which affect the public relations industry
- explain the importance of gathering information about target market segments
- outline methods of evaluating results of public relations documents
- outline key provisions of relevant legislation, codes of practice and national standards that affect public relations campaigns

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- public relations documents
- office equipment and resources
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBPUB501 Manage the public relations publication process

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 the design, production, implementation and evaluation of public relations publications in accordance with organisational requirements.

It applies to individuals who possess a sound theoretical knowledge base in advertising management and demonstrate a range of managerial skills to ensure that advertising 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

Business Development – Public Relations

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. Research publication requirements and segment target audience	1.1 Prepare a public relations research brief that specifies the research objectives, methodology, time schedule and budget 1.2 Consider the internal and external factors that may impact on the effectiveness of a public relations publication 1.3 Assess primary and secondary research methods for their

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ELEMENT	PERFORMANCE CRITERIA
	capacity to provide information on publications requirements and market segments 1.4 Evaluate and choose criteria to use in segmenting the audience in accordance with the public relations brief 1.5 Define the target audience in terms of prospective readers of the publications 1.6 Ensure the target audience profile meets organisational requirements in terms of level and style of language usage, format, content and level of detail
2. Plan public relations publications	2.1 Ensure publication purpose is consistent with the organisation's mission, vision and corporate values 2.2 Identify, obtain agreement on and document publication objectives and central message consistent with messages in other organisational publications 2.3 Select team members according to skill and knowledge requirements 2.4 Develop and obtain agreement on budgets and schedules with relevant stakeholders 2.5 Identify appropriate suppliers of goods and services and obtain quotations as required 2.6 Develop criteria to test and evaluate the success of the publication
3. Develop and evaluate public relations publications	3.1 Design and write publication text in accordance with communication objectives and house style 3.2 Check readability of material to ensure it is aligned to the target audience's reading levels 3.3 Test document with relevant stakeholders and incorporate findings in the final publication 3.4 Ensure publications, including any changes, comply with legal and ethical requirements 3.5 Select and contract suppliers to complete publication production processes 3.6 Distribute publication according to public relations plan 3.7 Evaluate aspects of the publication in line with stakeholder feedback and against evaluation criteria

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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, 1.6, 2.1, 2.2, 2.5, 3.1, 3.2, 3.4, 3.6, 3.7	• 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	1.1, 1.5, 2.2, 2.4, 2.6, 3.1, 3.3	• Uses clear, accurate and engaging language to develop research briefs and materials in a range of styles for various audiences
Oral Communication	2.2, 2.4, 3.3	• Employs listening and questioning techniques and negotiation skills to clarify information and confirm understanding • Clearly articulates instructions and information using language and features suitable for diverse audiences
Numeracy	1.1, 2.4, 2.5	• Uses basic mathematical formula to calculate whole numbers and decimals to determine suppliers' costs, project budgets and projected schedules
Navigate the world of work	1.2, 1.6, 2.1, 2.2, 3.1, 3.4	• Understands organisational goals and adheres to implicit and explicit organisation policies and procedures • Identifies the implications of legal and regulatory responsibilities related to own work
Interact with others	2.2, 2.4, 2.5, 3.3, 3.5	• 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
Get the work done	1.1-1.4, 2.2-2.6, 3.1, 3.3, 3.5-3.7	• 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

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		have been met • Uses digital applications to record, store, retrieve and share documents

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPUB501 Manage the public relations publication process	BSBPUB501A Manage the public relations publication process	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

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Assessment Requirements for BSBPUB501 Manage the public relations publication process

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:

- research, develop, implement and evaluate at least ONE complex public relations publication for a specific audience in accordance with 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 internal and external factors that may impact publication requirements
- explain what primary and secondary research methods are, and how they can be used in public relations
- explain the criteria used to select team members
- outline suppliers who may be required to complete publication production processes
- summarise key provisions of relevant legislation, codes of practice and national standards that affect public relations
- explain the relevance of ethics to public relations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- office equipment and resources
- examples of previous public relations documents
- case studies and, where possible, real situation
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBPUB502 Develop and manage complex public relations campaigns

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 multifaceted and potentially ongoing public relations campaigns. It builds upon the skills and knowledge acquired in the unit BSBPUB402 Develop public relations campaigns.

It applies to individuals working in senior roles who possess sound theoretical business skills and knowledge and who often have substantial experience and are 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

Business Development – Public Relations

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. Interpret a complex public relations campaign brief	1.1 Identify the primary objective of a complex public relations campaign brief 1.2 Identify the campaign's messages, strategies, roles and responsibilities, resource requirements including budget, timing and evaluation measures

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify legal and ethical constraints in relation to 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 using appropriate methods 2.3 Identify, access and select media appropriate to the target public and the campaign objectives 2.4 Ensure selected media enables reach and frequency requirements to be met within budget 2.5 Consult media directories to ensure that enlisted journalists and any other personnel are the most appropriate for the campaign 2.6 Ensure selected media meets media operational requirements 2.7 Ensure selected media meets legal and ethical requirements 2.8 Identify requirements for external suppliers and engage or contract these resources where required
3. Prepare public relations campaign plans	3.1 Scope, plan and document a complex public relations campaign and its approach to suit client requirements 3.2 Seek quotations from suppliers for materials and evaluate against budgetary requirements or constraints 3.3 Determine and agree on budget 3.4 Determine and agree on timing and schedules 3.5 Identify potential sources of risk and develop and document appropriate control mechanisms 3.6 Produce plans on time 3.7 Finalise plan, ensuring it complies with organisational, client, professional and legal requirements
4. Implement public relations campaign plans	4.1 Implement and regularly monitor public relations plan 4.2 Identify, agree on and implement any changes to the plan 4.3 Complete planning and implementation activities on time

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.3, 2.1-2.8, 3.1, 3.7, 4.1, 4.2	• Interprets, analyses and synthesises complex information from various sources
Writing	2.8, 3.1-3.5, 3.7, 4.2	• Uses clear, engaging and persuasive language to produce documentation in a range of styles for different audiences and contexts
Oral Communication	2.8, 3.2-3.4, 4.2	• Clearly articulates instructions and information using appropriate language and features for various audiences • Employs listening and questioning techniques to confirm understanding
Numeracy	1.2, 2.4, 3.2-3.4	• Uses mathematical formula to calculate whole numbers and decimals to determine work schedules and budgetary requirements
Navigate the world of work	1.3, 2.7, 2.8, 3.7	• Complies with organisational, legal and ethical requirements relevant to own role
Interact with others	3.2-3.4, 4.2	• 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
Get the work done	1.1, 1.2, 2.1-2.4, 3.1, 3.3-3.6, 4.1-4.3	• 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 • Uses digital applications to record, store, retrieve and share documents

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPUB502 Develop and manage complex public relations campaigns	BSBPUB502A Develop and manage complex public relations campaigns	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBPUB502 Develop and manage complex public relations campaigns

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:

- prepare a complex public relations campaign plan containing the organisation's objectives, messages and strategies, risk assessment, roles and responsibilities, scheduling, budgetary and resource requirements
- engage external suppliers where appropriate
- implement a complex public relations campaign effectively
- monitor the success of campaign.

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:

- summarise key provisions of relevant legislation, codes of practice and national standards that affect public relations
- outline a range of media vehicles and explain the factors to consider before using them
- describe techniques for managing complex public relations projects
- explain techniques used to identify and manage risks.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- office equipment and resources
- examples of public relations communication documents
- case studies and, where possible, real situations

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- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBPUB503 Manage fundraising and sponsorship activities

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 and administer fundraising and sponsorship activities.

It applies to individuals in not-for-profit organisations who typically have responsibility for the work of other staff and lead teams in developing submissions, identifying funding prospects and budgets according to organisational requirements.

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

Unit Sector

Business Development – Public Relations

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. Identify factors influencing fundraising or sponsorship	1.1 Identify relevant environmental issues in relation to fundraising and sponsorship 1.2 Identify available sources of funding or sponsorship including criteria, conditions or constraints related to funding 1.3 Conduct research to identify the most appropriate target public for fundraising or sponsorship activities in accordance with organisation profile and requirements 1.4 Identify and consider legal and ethical requirements in relation

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ELEMENT	PERFORMANCE CRITERIA
	to fundraising or sponsorship 1.5 Make recommendations for fundraising, sponsorship campaigns or activities based on research findings
2. Prepare a funding submission	2.1 Evaluate organisation's current operations and readiness to apply for funding 2.2 Develop a funding submission which meets the funding source's guidelines and criteria 2.3 Ensure the submission complies with all legal and ethical requirements 2.4 Write the submission to meet the needs of the grantor and submitting organisation
3. Develop a fundraising or sponsorship campaign	3.1 Confirm the aims, objectives, outcomes and evaluation measures for a fundraising or sponsorship campaign with senior management 3.2 Conduct a feasibility study to ensure all aspects of the fundraising or sponsorship campaign have been considered 3.3 Examine and agree upon budgets with senior management 3.4 Prepare and obtain agreement on a campaign plan for fundraising or sponsorship activities that meets organisational, ethical and legal requirements
4. Implement a fundraising or sponsorship campaign	4.1 Conduct a fundraising or sponsorship campaign in accordance with plan 4.2 Monitor progress of campaign and make necessary alterations as required 4.3 Ensure any changes are agreed upon by relevant stakeholders 4.4 Ensure changes meet legal and ethical requirements
5. Evaluate campaign	5.1 Evaluate campaign outcomes against outcomes documented in campaign plan 5.2 Obtain feedback on performance of fundraising or sponsorship campaign from stakeholders 5.3 Develop mechanisms to incorporate feedback into any future fundraising campaigns

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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, 2.3, 2.4, 3.2-3.4, 4.1, 4.2, 4.4, 5.1	• Interprets and analyses complex information to identify grant bodies' guidelines, sponsor's requirements and legislative and regulatory expectations
Writing	1.5, 2.2, 2.4, 3.1, 3.4, 5.2	• Uses clear and precise language, and suitable formatting and style, to develop campaign plans, submissions and internal communications
Oral Communication	3.1, 3.3, 3.4, 4.3, 5.2	• Employs listening and questioning techniques to clarify information and confirm understanding • Clearly articulates information using language and features suitable to diverse audiences
Numeracy	1.2, 3.3	• Uses mathematical formula to calculate whole numbers and decimals to determine funding constraints and sponsorship budgets
Navigate the world of work	1.4, 2.3, 3.4, 4.4	• Understands and complies with all organisational, legal and ethical requirements relevant to own role
Interact with others	3.1, 3.3, 3.4, 4.3, 5.2	• 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
Get the work done	1.1-1.3, 2.1, 2.4, 3.1, 3.2, 3.4, 4.1, 4.2, 5.1, 5.3	• Plans, coordinates and sequences tasks to ensure that timelines are met • Monitors progress of plans and implements changes, where required • Uses analytical approaches to build knowledge required to make decisions • Evaluates outcomes to identify improvements for future reference • Uses digital applications to record, store, retrieve and share documents

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPUB503 Manage sponsorship and fundraising activities	BSBPUB503A Manage sponsorship and fundraising activities	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

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Assessment Requirements for BSBPUB503 Manage fundraising and sponsorship activities

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:

- research and recommend fundraising or sponsorship campaigns or activities
- develop funding submissions according to requirements
- prepare, implement and evaluate a fundraising or sponsorship campaign.

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:

- summarise key provisions of relevant legislation that affect fundraising and sponsorship activities
- identify organisational culture, policies and procedures relevant to fundraising and sponsorship activities
- explain the relevance of donor motivation to fundraising and sponsorship activities
- outline fundraising alternatives.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- office equipment and resources
- examples of public relations communication documents
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBPUB504 Develop and implement crisis management 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 coordinate, cultivate and apply a crisis management plan.

It applies to individuals who demonstrate a range of managerial skills in senior public relations roles. People in this role have primary responsibility for preparing and instigating a planned communications response in an emergency.

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

Unit Sector

Business Development – Public Relations

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. Develop crisis management plans	1.1 Conduct research to identify crisis management best practice 1.2 Consult relevant groups and individuals for input into the crisis management plan 1.3 Document, distribute and maintain organisational crisis management plan 1.4 Ensure organisational crisis management plan is clearly understood by relevant groups

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Ensure crisis management plan complies with organisational policies and legal and ethical requirements 1.6 Practise simulated crisis responses
2. Implement a crisis management plan	2.1 Set up a dedicated crisis resource centre 2.2 Develop a crisis response team to deal with media and conduct issue tracking 2.3 Monitor media to ensure the organisation is aware of possible crises 2.4 Implement and monitor issues tracking systems according to crisis plan
3. Review and update crisis management plans	3.1 Consult managers and employees about the effectiveness of the crisis plan 3.2 Amend crisis management plan as necessary to comply with legal and ethical requirements

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, 1.5, 2.3, 2.4, 3.2	• Interprets and analyses complex information from relevant sources to confirm requirements
Writing	1.2-1.3, 3.2	• Records results of research and feedback • Uses clear and precise language, and suitable formatting and style, to develop and update crisis management plans
Oral Communication	1.2, 1.4, 2.2, 3.1	• Employs listening and questioning techniques to clarify information and confirm understanding • Clearly articulates information using language and features suitable to diverse audiences
Navigate the world of work	1.5, 3.2	• Understands and complies with to all legal and regulatory responsibilities related to own work
Interact with others	1.2, 1.4, 2.2, 3.1	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own

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		role • Collaborates with others to achieve shared understanding
Get the work done	1.1, 1.3, 1.4, 1.6, 2.1, 2.2, 2.4	• Organises and implements tasks required to achieve required outcomes, with an awareness of how the outcomes contribute to the organisation's goals • Uses analytical processes to decide on appropriate approach to crisis management

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPUB504 Develop and implement crisis management plans	BSBPUB504A Develop and implement crisis management 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

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Assessment Requirements for BSBPUB504 Develop and implement crisis management 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, distribute and implement a crisis management plan that complies with organisational, ethical and legal requirements
- work with others to evaluate a crisis management plan and make necessary amendments.

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 provisions of legislation, codes of practice and national standards that affect crisis management
- explain the components of a crisis management plan
- explain the relevance of media management to a crisis management plan.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the public relations field of work and include access to:

- office equipment and resources
- examples of crisis management planning and evaluation documents
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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	• Creates everyday workplace documentation l 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	• 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	• 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	• Adheres to organisational procedures and policies • Understands how own role connects with others and contributes to broader work goals

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Interact with others	1.1, 1.2, 2.1, 2.3-2.5, 3.2	• 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	• 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

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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

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- 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

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BSBPUR401 Plan purchasing

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 prepare invitations to offer, identify suppliers, issue invitations to offer, and prepare purchase recommendations.

It applies to individuals who are required to prepare for complex purchasing agreements up to and including the point at which the organisation selects, without prejudice, a supplier.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare invitations to offer	1.1 Obtain specifications for goods and services to be purchased from relevant personnel and clarify as required 1.2 Select purchasing methods most appropriate to particular purchases 1.3 Prepare invitations to offer 1.4 Obtain approval of invitations to offer
2. Identify suppliers	2.1 Review organisation’s records for potential suppliers

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Identify sources of supply 2.3 Invite suppliers 2.4 Evaluate sources of supply against requirements of purchasing strategies
3. Issue invitations to offer	3.1 Distribute invitations to offer 3.2 Conduct briefings as required 3.3 Clarify issues arising with suppliers in line with purchasing strategies
4. Prepare recommendations to purchase	4.1 Receive offer documents from suppliers 4.2 Assess offer documents against requirements of purchasing strategies 4.3 Seek further information from suppliers as required 4.4 Obtain specialist expertise to assist with evaluation as required 4.5 Evaluate offers against requirements of purchasing strategies 4.6 Prepare shortlists of suppliers that make offers and who meet purchasing criteria 4.7 Select preferred offers 4.8 Make recommendations about preferred offers and seek approval from relevant personnel 4.9 Obtain approval for recommended offers

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, 2.4, 4.2, 4.5-4.7	• Gathers and interprets a range of textual information to identify relevant key information
Writing	1.3, 1.4, 2.3, 4.3, 4.6, 4.8, 4.9	• Creates everyday workplace documentation l using terminology and format relevant to audience and purpose
Oral	1.1, 1.4, 3.2, 3.3,	• Uses suitable language to liaise with suppliers and

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Communication	4.3, 4.8, 4.9	clarify information within the organisation • Uses active questioning and listening techniques to confirm requirements
Navigate the world of work	1.1, 2.4, 3.3, 4.2, 4.5, 4.6	• Follows organisational procedures and policies • Understands how own role connects with others and contributes to broader work goals
Get the work done	1.2, 1.3, 2.1-2.4, 3.1, 4.1, 4.3-4.7	• 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**
BSBPUR401 Plan purchasing	BSBPUR401B Plan purchasing	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

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Assessment Requirements for BSBPUR401 Plan purchasing

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:

- confirm goods or services required and prepare invitations to offer
- identify and evaluate potential suppliers
- issue an invitation to offer
- shortlist suppliers and make a recommendation to purchase.

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 practices, policies and procedures for purchasing
- 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 procedure
- purchasing strategies and relevant purchasing records
- office equipment and supplies
- case studies and, where possible, real situations.

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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

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BSBPUR402 Negotiate contracts

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 negotiate terms of contracts with suppliers, and prepare and finalise contracts.

It applies to individuals who negotiate contracts as part of a broad purchasing role but are not specialist legal practitioners. They are required to negotiate and formalise complex purchasing arrangements involving significant risk and/or significant expenditure and detailed legal and documentation arrangements and are typically guided by organisational contract negotiation guidelines. They work under minimal supervision of a senior purchasing 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 – Purchasing and Contracting

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. Negotiate terms of contracts with suppliers	1.1 Offer advice and undertake negotiations without prejudice 1.2 Advise suppliers of the organisation’s intent to accept their offers 1.3 Negotiate issues with suppliers 1.4 Determine desired outcomes, negotiation plans and schedules

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ELEMENT	PERFORMANCE CRITERIA
	for negotiations 1.5 Undertake negotiations and reach agreements with suppliers in accordance with plans 1.6 Negotiate and document contract requirements to the satisfaction of the organisation and suppliers
2. Prepare contracts	2.1 Draft required contracts using legal expertise if required 2.2 Distribute draft contracts to relevant personnel and suppliers 2.3 Ensure any discrepancies or disagreements are clarified and resolved to the satisfaction of all parties 2.4 Ensure checks of the legality and validity of draft contracts are made 2.5 Obtain approvals to sign contracts
3. Finalise contracts	3.1 Ensure contracts are signed and exchanged between the organisation and suppliers 3.2 Ensure contracts and related documents are stored and safeguarded 3.3 Advise relevant personnel of contract requirements 3.4 Advise unsuccessful suppliers of non-acceptance of offers

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, 2.1, 2.4	• Interprets and analyses textual information from a range of sources and identifies relevant key information to assist in the negotiation process
Writing	1.2, 1.6, 2.1, 2.3, 2.5, 3.3, 3.4	• Develops material to convey explicit information and results using clear and detailed language appropriate to audience and context
Oral Communication	1.1-1.3, 1.5, 1.6, 2.5, 3.3	• 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

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Navigate the world of work	1.5, 1.6, 2.1, 2.4	• 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	1.1-1.3, 1.5, 1.6, 2.2, 2.3, 2.5, 3.1, 3.3, 3.4	• 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	1.4, 2.2, 2.3, 3.1, 3.2	• 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**
BSBPUR402 Negotiate contracts	BSBPUR402B Negotiate contracts	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

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Assessment Requirements for BSBPUR402 Negotiate contracts

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:

- produce a documented agreement of terms with suppliers
- draft and complete a contract with a supplier for goods and services
- produce a document to inform successful and unsuccessful suppliers.

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 provide an overview of key provisions of relevant legislation, codes of practice and national standards that affect purchasing
- outline organisation practices, policies and procedures for purchasing
- 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 supplies

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- 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

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BSBPUR403 Conduct international purchasing

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 international purchasing.

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 purchasing of specified goods within organisation policies and procedures and regulatory frameworks. Individuals undertaking this unit are typically purchasing in accordance with an organisation's international purchasing guidelines and work under minimal supervision of a senior purchasing 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 – Purchasing and Contracting

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. Source international suppliers	1.1 Identify goods to be purchased internationally 1.2 Research potential sources of supply from relevant information sources

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Examine market structures for proposed purchases 1.4 Determine regulations governing international purchasing 1.5 Identify potential sources of supply from research 1.6 Seek assistance and clarification as required on which organisation procedures, policies and regulations govern the international purchasing of specified goods 1.7 Apply organisation procedures, policies and regulations governing the international purchasing of specified goods
2. Prepare invitations to offer for imported goods	2.1 Obtain and clarify specifications of requirements for international purchasing of specified goods from relevant personnel as required 2.2 Select purchasing strategy most appropriate to the proposed purchase 2.3 Develop and document invitations to offer 2.4 Ensure invitations to offer are checked for compliance with regulations, organisation policies and procedures and description of required goods 2.5 Develop, document and obtain approval for criteria for evaluating offers 2.6 Issue invitations to offer to prospective suppliers after gaining approval from relevant personnel
3. Prepare recommendations in response to offers	3.1 Receive offer documents from suppliers 3.2 Assess offer documents against documented criteria and requirements of purchasing strategies 3.3 Seek further information from suppliers, as required, to clarify offers 3.4 Evaluate offers against purchasing criteria 3.5 Select preferred offer and make recommendation for approval to relevant personnel 3.6 Obtain approval for recommended offers
4. Action successful offers	4.1 Draft contract with successful supplier 4.2 Access legal expertise to ensure legality of contract agreements 4.3 Issue contract in accordance with received approval 4.4 Inform unsuccessful offers of outcome of evaluation process
5. Arrange importation of	5.1 Assess risks in ownership and transport of goods from point of

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ELEMENT	PERFORMANCE CRITERIA
goods	delivery to final destination 5.2 Arrange relevant insurance cover 5.3 Seek agents as required to arrange inspection, packing, transport, importation, customs clearance and delivery of goods into store 5.4 Satisfy statutory and regulatory requirements including fumigation and export/import controls 5.5 Ensure supply and logistics channels are managed, to achieve delivery of goods satisfactorily and within designated timelines
6. Arrange provision of foreign currency payments	6.1 Obtain advice on payment strategy to be followed 6.2 Receive arrangements made to initiate currency hedging, letter of credit or payment by direct cheque in accordance with advice 6.3 Authorise payments at appropriate times
7. Ensure all contractual obligations are satisfied	7.1 Ensure that actions are taken to rectify any non-compliance with contractual conditions and specifications

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	1.1-1.7, 2.1, 2.4, 3.2, 3.4, 4.2, 5.1	• Gathers and analyses textual information from a range of sources and identifies relevant key information for work requirements
Writing	2.3, 2.5, 2.6, 3.3, 3.4, 3.5, 3.6, 4.1, 4.2, 4.3, 4.4, 5.1, 5.3, 6.1, 6.2, 6.3	• Develops clear workplace documents appropriate to audience and context • Completes authorisations according to requirements
Oral Communication	1.6, 2.1, 2.5, 3.3, 3.6, 4.2, 5.3, 6.1	• 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	2.1, 3.4, 5.2, 6.2, 6.3	• Interprets numerical data to determine purchasing, insurance and foreign currency requirements

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Navigate the world of work	1.4, 1.6, 1.7, 2.1, 2.2, 2.4, 4.2, 5.4, 7.1	• 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	1.6, 2.1, 2.5, 2.6, 3.3, 3.5, 3.6, 4.1, 4.2, 5.3, 6.1	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.5, 2.2, 2.3, 2.5, 2.6, 3.1, 3.2, 3.4, 3.5, 5.1, 5.2, 5.5, 6.1, 6.3, 7.1	• 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**
BSBPUR403 Conduct international purchasing	BSBPUR403B Conduct international purchasing	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

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Assessment Requirements for BSBPUR403 Conduct international purchasing

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:

- source international suppliers for specified goods
- prepare and issue invitations to offer
- evaluate and select successful offers
- issue contracts with preferred suppliers
- inform unsuccessful suppliers of outcome of evaluation process
- arrange importation of goods and foreign currency payments
- check that contractual conditions have been met, and take action if non-compliances are identified.

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 give an overview of key provisions of relevant legislation that affects business operations, codes of practice and national standards
- list methods of payment applicable to international purchasing
- outline organisational policies and procedures for international purchasing
- list the range of agencies and organisations involved in arranging importation arrangements such as:
  - consultants
  - customs brokers
  - freight forwarders
  - logistics and transport companies

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- identify relevant insurance brokers and outline the range of available types of policies to cover risks of international purchasing
- outline external organisations that can provide information and assistance available from external organisations.

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.

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

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BSBPUR501 Develop, implement and review purchasing strategies

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 evaluate an organisation's purchasing strategies, and implement improvements to those strategies.

It applies to individuals working in organisations in roles such as senior purchasing officer or purchasing manager, supporting the work of other employees carrying out purchasing activities. 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 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine purchasing objectives	1.1 Research and analyse the suitability of industry benchmarks for purchasing for the organisation 1.2 Analyse organisation’s purchasing data and information 1.3 Undertake consultations with relevant stakeholders and personnel to inform development of purchasing objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Draft purchasing objectives in line with organisation's goals 1.5 Gain approval from relevant personnel for purchasing objectives
2. Develop purchasing strategies	2.1 Develop purchasing strategies, taking into account legal requirements and purchasing objectives 2.2 Include the 'five rights of purchasing' criteria 2.3 Develop human resource, financial and other plans to support implementation of purchasing strategies 2.4 Make changes resulting from feedback from relevant personnel about purchasing plans and strategies 2.5 Gain approval for plans to implement purchasing plans and strategies
3. Implement purchasing strategies	3.1 Communicate purchasing strategies to relevant personnel and stakeholders 3.2 Access resources needed to implement purchasing strategies 3.3 Provide support to implement purchasing strategies 3.4 Monitor implementation of purchasing strategies by the organisation 3.5 Identify and address problems and issues arising during implementation of purchasing strategies 3.6 Provide reports to relevant personnel and stakeholders on the implementation of purchasing strategies
4. Evaluate purchasing strategies and implement improvements	4.1 Review implementation of purchasing strategies 4.2 Identify improvements to purchasing strategies from review process 4.3 Gain approval to implement improvements to purchasing strategies 4.4 Communicate improvements to relevant stakeholders and provide support to implement improvements 4.5 Monitor and review implementation of improvements to determine their effectiveness

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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, 2.1, 2.3, 2.4, 3.1, 4.1, 4.5	• Interprets textual information from a range of sources and determines how content may be applied to organisational requirements
Writing	1.4, 2.1, 2.3-2.5, 3.1, 3.3, 4.3, 4.4	• Develops complex material to convey explicit information and results using clear and detailed language appropriate to relevant audience and context
Oral Communication	1.3, 1.5, 2.4, 3.1, 3.3, 4.3, 4.4	• 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	1.2	• Interprets a range of numerical data to determine purchasing objectives
Navigate the world of work	1.4, 2.1	• Appreciates the implications of organisational, legal and regulatory responsibilities that relate to own work
Interact with others	1.3, 1.5, 2.5, 3.1, 3.3, 3.6, 4.3, 4.4	• Liaises with suppliers and relevant stakeholders to negotiate agreement on purchasing strategies • 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, 1.5, 2.4, 3.2-3.6, 4.2, 4.4, 4.5	• 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
BSBPUR501 Develop, implement	BSBPUR501B Develop, implement	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
and review purchasing strategies	and review purchasing strategies	Training Packages	

Links

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

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Assessment Requirements for BSBPUR501 Develop, implement and review purchasing strategies

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 purchasing objectives and strategies for an organisation
- implement purchasing strategies developed in an organisation
- evaluate and implement improvements to purchasing strategies in an 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:

- summarise key provisions of relevant legislation that affect purchasing and contracting
- explain 'the five rights'
- outline industry benchmarks for purchasing
- outline organisation policies and procedures related to:
  - business terms and conditions for purchasing
  - contracting and tendering
  - ethical behaviour
  - purchasing.

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

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- office equipment 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

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BSBPUR502 Manage supplier relationships

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 relationships with suppliers of larger purchases or multiple smaller purchases, where the relationship is of some significance to the organisation. It covers managing purchasing 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 purchasing officer or purchasing manager.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Manage purchasing agreements	1.1 Monitor supplier performance throughout the duration of agreements 1.2 Identify, monitor and manage risks in risk management plans throughout the duration of agreements 1.3 Identify and address potential and actual performance issues 1.4 Negotiate and resolve amendments to agreements as a

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ELEMENT	PERFORMANCE CRITERIA
	consequence of addressing performance issues 1.5 Seek and obtain approval for amendments 1.6 Communicate approved amendments to suppliers and relevant personnel
2. Resolve disagreements with suppliers	2.1 Identify and investigate causes of disagreements with suppliers and assess their validity 2.2 Negotiate and resolve disagreements 2.3 Document amendments to agreements as a consequence of the resolution of disagreements 2.4 Seek and obtain approval for amendments 2.5 Communicate approved amendments to suppliers and relevant personnel
3. Finalise agreements	3.1 Confirm all supplier obligations as having been met prior to agreements being finalised 3.2 Finalise purchasing agreements on completion of contract 3.3 Document arrangements to finalise agreements
4. Review performance of suppliers	4.1 Evaluate supplier performance against the requirements of purchasing agreements 4.2 Inform suppliers of evaluation outcomes as required 4.3 Make recommendations about future use of suppliers 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	Performance Criteria	Description
Reading	1.1, 1.2, 1.4, 2.1, 2.5, 3.1-3.3, 4.1	• Interprets textual information from a range of sources and determines how content may be applied to organisational requirements
Writing	1.5, 1.6, 2.3-2.5, 3.3, 4.1, 4.2, 4.3	• Documents amendments to agreements • Develops documentation according to organisational formats

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Oral Communication	1.4-1.6, 2.1, 2.2, 2.5, 3.1, 4.2, 4.3	• 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	3.2	• Interprets financial information within purchasing agreements
Navigate the world of work	3.2, 4.1	• Understands legal and organisational obligations that underpin agreements and contracts
Interact with others	1.4-1.6, 2.1, 2.2, 2.4, 2.5, 3.1, 4.2, 4.3	• 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	1.1-1.3, 2.1, 2.3, 4.1-4.3	• 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**
BSBPUR502 Manage supplier relationships	BSBPUR502B Manage supplier relationships	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

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Assessment Requirements for BSBPUR502 Manage supplier relationships

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:

- successfully manage relationships with suppliers over the life of specific purchasing agreements
- resolve a dispute with a supplier
- 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

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

- identify key provisions of relevant legislation that affect purchasing and contracting
- identify and describe methodologies to monitor, review and evaluate supplier performance
- identify and outline organisation's policies and procedures related to:
  - conduct and ethics
  - purchasing
  - 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 – purchasing and contracting field of work and include access to:

- organisation policies and procedures

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- purchasing strategies and relevant purchasing records
- office equipment and supplies
- 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

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BSBPUR503 Manage international purchasing

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 international purchasing of specific goods within organisation policies and procedures and regulatory frameworks.

It applies to individuals who are responsible for managing international purchasing in an organisation. They develop and implement relevant supply chain management strategies, manage and review the implementation of improvements to international purchasing strategies and support the work of employees carrying out international purchasing functions.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop and document strategies for international purchasing	1.1 Research and analyse strategic implications for the organisation’s international purchasing 1.2 Research international market structures 1.3 Research and analyse export requirements of supplier country 1.4 Draft and submit for approval the organisation’s strategies for international purchasing

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ELEMENT	PERFORMANCE CRITERIA
2. Implement international purchasing strategies	2.1 Communicate international purchasing strategies to relevant personnel and stakeholders 2.2 Provide support to stakeholders to implement international purchasing strategies 2.3 Monitor implementation of international purchasing strategies within the organisation 2.4 Identify and address problems and issues arising from implementation of international purchasing strategies
3. Undertake more complex international purchasing	3.1 Ensure that export markets and cultural considerations having a potential impact on international purchasing are researched and appropriate markets chosen 3.2 Research and apply relevant international legal requirements on sale of goods and Australian regulatory controls applicable to imports into Australia 3.3 Apply relevant INCOTERMS and trade terms to international purchasing 3.4 Draft exception clauses to business conditions 3.5 Clarify and resolve any discrepancies to the satisfaction of all parties 3.6 Prepare draft contract and access legal expertise to check legality of contract agreement
4. Determine payment strategies	4.1 Analyse financial risk and implement available controls 4.2 Identify source and availability of funds for payment 4.3 Research and analyse currency payment methods 4.4 Select currency payment methods 4.5 Plan and implement expenditure phasing
5. Arrange barter or countertrade	5.1 Research and analyse strategic implications of arranging specific barter or countertrade 5.2 Determine suppliers willing to engage in international barter or countertrade 5.3 Negotiate and reach agreement with partners on commercial conditions for proposed barter or countertrade 5.4 Prepare draft contract and access legal expertise to check legality of contract agreement 5.5 Approve and issue contracts 5.6 Investigate and resolve any disagreements and discrepancies to

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ELEMENT	PERFORMANCE CRITERIA
	the satisfaction of all parties
6. Determine logistics strategies	6.1 Determine requirements for pre-shipment inspection and arrange inspection 6.2 Research and analyse shipping facilities and other transport risks 6.3 Research and analyse regulatory compliance requirements for importation into Australia 6.4 Develop logistics strategies for the organisation taking into account appropriate transport, insurance and regulatory compliance requirements 6.5 Gain approval from relevant personnel for implementation of logistics strategies
7. Evaluate international purchasing strategies and implement identified improvements	7.1 Review implementation of international purchasing strategies 7.2 Identify improvements to international purchasing strategies from the review process 7.3 Gain approval to implement improvements to international purchasing strategies 7.4 Communicate changes to relevant stakeholders and identify support provided to implement improvements 7.5 Monitor and review implementation of changes to determine effectiveness of improvements

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, 2.2-2.4, 3.1, 3.2, 3.6, 4.3, 5.1, 5.2, 5.4, 6.2-6.4, 7.1, 7.5	• Interprets complex textual information and determines how content may be applied to organisational requirements
Writing	1.4, 2.1, 3.4, 3.6, 5.4, 5.5, 6.4, 6.5, 7.3, 7.4	• Develops and revises strategic, contractual and purchasing material to appropriate to audience and context

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		• Completes authorisations according to requirements
Oral Communication	2.1, 2.2, 3.5, 5.3, 5.6, 7.3, 7.4	• 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	1.1, 1.3, 2.3, 3.3, 4.1-4.5, 6.4	• Interprets financial information and makes calculations when considering commercial risks, purchasing strategies and insurance requirements
Navigate the world of work	1.1, 1.3, 2.1-2.4, 3.2, 3.3, 3.6, 5.1, 5.3, 6.3, 6.4	• 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	2.1, 2.2, 3.5, 5.3, 5.5, 5.6, 6.5, 7.3, 7.4	• 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	1.1, 2.3, 2.4, 3.5, 4.1, 4.4, 4.5, 5.1, 5.2, 5.6, 6.1, 7.1, 7.2, 7.5	• 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**
BSBPUR503 Manage international purchasing	BSBPUR503B Manage international purchasing	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBPUR503 Manage international purchasing

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:

- complete documented international purchasing strategies for an organisation
- implement international purchasing strategies in an organisation
- complete a complex international purchase
- complete a barter or countertrade
- implement an evaluation of transport and logistics strategies to obtain goods purchased internationally.

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 international markets and cultural considerations relevant to purchasing in supplier countries
- explain what INCOTERMS are, and what they are used for
- outline and explain methods of payment applicable to international purchasing, including barter and countertrade
- identify organisation policies and procedures for international purchasing
- identify available agencies involved in arranging importation arrangements such as:
  - consultants
  - customs brokers
  - freight forwarders
- identify available insurance brokers and types of policies to cover identified risks
- identify sources of information and assistance external to organisation
- identify available logistics and transport companies.

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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.

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

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BSBPUR504 Manage a supply chain

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 supply chain, including the relationships between an organisation and its supply and demand partners along the chain.

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 – Purchasing and Contracting

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. Implement demand driven supply chain management strategy	1.1 Assign responsibility for supply chain management within the organisation in accordance with supply chain management strategy 1.2 Access and organise technology and software for implementation of the supply chain management system within the requirements of the strategy and budgetary allocation 1.3 Design policies and procedures to guide business relations and operations in accordance with organisation strategy 1.4 Design or re-design supporting business processes to assist in implementing organisation strategy

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Provide support to staff, customers and supply chain to assist in implementation of the organisation's supply chain management strategy
2. Manage supply chain	2.1 Manage communication and information exchange with strategic partners and suppliers in accordance with the supply chain management strategy 2.2 Facilitate and collaborate with supply chain organisations to determine demand at each level of the supply chain in accordance with the supply chain management strategy 2.3 Manage sales and payments in accordance with supply chain and risk management strategies, and legal and ethical requirements 2.4 Implement actions to build trust and foster a supply chain culture in accordance with the supply chain management strategy 2.5 Identify opportunities to adjust policies and procedures to respond to the changing needs of customers, supply chain and the organisation
3. Evaluate and improve supply chain effectiveness	3.1 Monitor demand chain management and supply chain management in accordance with the supply chain management strategy 3.2 Review and identify improvements in the effectiveness of the supply chain with each level of the supply chain, including staff and customers 3.3 Compare business data and reports of outcomes, budgets, timelines and forecasts to actual performance 3.4 Review technology performance and make recommendations for improvements to hardware, software and/or their use in accordance with strategy and budget 3.5 Use feedback and evaluation results to plan and improve future supply chain management strategies

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

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Reading	1.1-1.5, 2.1-2.5, 3.1, 3.3-3.5	• 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	1.1, 1.3-1.5, 3.2, 3.4, 3.5	• Designs, develops and revises strategic documents appropriate to audience and context
Oral Communication	1.1, 1.5, 2.2, 3.2	• 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	1.2, 2.3, 3.3	• Analyses and compares financial information to assist in managing, evaluating and improving the supply chain
Navigate the world of work	1.1, 1.3, 2.1, 2.2, 2.3, 2.5, 3.1, 3.4	• 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	1.1, 1.5, 2.1, 2.2, 2.4, 3.2	• 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	1.1, 1.2, 2.1, 2.3-2.5, 3.1, 3.2-3.5	• 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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPUR504 Manage a supply chain	BSBPUR504B Manage a supply chain	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

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Assessment Requirements for BSBPUR504 Manage a supply chain

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:

- implement a supply chain management strategy
- successfully manage a supply chain
- 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

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

- identify key provisions of relevant legislation that affects purchasing and contracting operations
- explain organisation policies and procedures related to:
  - business terms and conditions for purchasing, tendering and contracting
  - contracting and tendering
  - ethical behaviour
  - purchasing
  - supply chain management
- outline techniques to establish collaborative relationships.

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

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- purchasing strategies and relevant purchasing records
- office equipment 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

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BSBREL401 Establish networks

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 maintain effective work relationships and networks through relationship building and negotiation skills required by workers within an organisation as well as freelance or contract workers.

It applies to individuals with a broad knowledge of networking and negotiation 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 to delegate aspects of tasks to others.

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

Unit Sector

Stakeholder Relations – Relationship Management

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. Develop and maintain business networks	1.1 Use appropriate network strategies to establish and maintain relationships that promote the development of business opportunities 1.2 Identify and pursue network opportunities to maximise a range of contacts 1.3 Communicate information regarding new networks to inform

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ELEMENT	PERFORMANCE CRITERIA
	individuals, colleagues and clients of potential benefits 1.4 Participate in professional networks and associations to obtain and maintain personal knowledge and skills
2. Establish and maintain business relationships	2.1 Develop and maintain relationships to promote benefits consistent with organisational/client requirements 2.2 Gain and maintain trust and confidence of contacts through demonstration of high standards of business practices 2.3 Use a high level of negotiation skills to encourage positive outcomes 2.4 Identify difficult situations and negotiate solutions using collaborative problem-solving techniques 2.5 Seek specialist advice in the development of contacts where appropriate
3. Promote the relationship	3.1 Develop strategies to represent and promote the interests and requirements of the relationship 3.2 Use appropriate presentation skills to communicate the goals and objectives of the relationship 3.3 Effectively communicate issues, policies and practices of the relationship to a range of audiences, in writing and verbally 3.4 Obtain feedback to identify and develop ways to improve promotional activities within available opportunities

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	1.4, 3.4	• Seeks opportunities to develop and extend expertise and identify areas for professional improvement
Reading	2.1	• Sources and analyses information to establish networks that consistently promote business opportunities
Writing	1.1-1.3, 2.1, 2.2, 2.5 3.1-3.4	• Uses appropriate vocabulary, layout and grammatical structure to convey ideas and information

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Oral Communication	1.1-1.4, 2.1-2.5, 3.2, 3.3, 3.4	• Utilises persuasive language and appropriate non-verbal features to achieve mutually acceptable outcomes • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	2.1	• Understands and adheres to organisational policies and procedures
Interact with others	1.1-1.4, 2.1-2.5, 3.1, 3.2	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Looks for ways of establishing connections and building genuine understanding with a diverse range of people • Begins to cultivate relationships with people with the knowledge, skills and influence to get things done or provide support
Get the work done	1.1, 1.2, 2.1, 2.4	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBREL401 Establish networks	BSBREL401A Establish networks	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

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Assessment Requirements for BSBREL401 Establish networks

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 and use networking opportunities
- maintain records of relevant contacts
- use written and verbal communication skills to establish, cultivate and promote professional business relationships
- use feedback to improve promotional 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:

- list and describe strategies for establishing and maintaining business relationships
- identify relevant networks, organisations, agencies, associations or individuals
- describe the principles and techniques needed to negotiate positive outcomes
- explain client or organisational policies, plans and procedures relevant to business relationships
- outline methods for obtaining feedback on promotional activities.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – relationship management field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBREL402 Build client relationships and business networks

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, maintain and improve client relationships and to actively participate in networks to support attainment of key business outcomes.

It applies to individuals such as marketing and sales professionals who depend on excellent interpersonal relationships and communication skills to achieve outcomes but may also apply to other individuals working in any industry.

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

Unit Sector

Stakeholder Relations – Relationship Management

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. Initiate interpersonal communication with clients	1.1 Identify and use preferred client communication styles and methods 1.2 Establish rapport with clients using verbal and non-verbal communication processes 1.3 Investigate and act upon opportunities to offer positive feedback to clients

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Use open questions to promote two-way communication 1.5 Identify and act upon potential barriers to effective communication with clients 1.6 Initiate communication processes which relate to client needs, preferences and expectations
2. Establish client relationship management strategies	2.1 Develop client loyalty objectives focusing on the development of long term business partnerships 2.2 Assess client profile information to determine approach 2.3 Develop client loyalty strategies to attract and retain clients in accordance with the business strategy 2.4 Identify and apply client care and client service standards
3. Maintain and improve ongoing relationships with clients	3.1 Develop strategies to obtain ongoing feedback from clients to monitor satisfaction levels 3.2 Develop strategies to elicit feedback which provide information in a form that can be used to improve relationships with clients 3.3 Obtain feedback to develop and implement strategies which maintain and improve relationships with clients
4. Build and maintain networks	4.1 Allocate time to establish and maintain business contacts 4.2 Participate in business associations and/or professional development activities to establish and maintain a network of support for the business and to enhance personal knowledge of the market 4.3 Establish communication channels to exchange information and ideas 4.4 Provide, seek and verify information to the network

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, 2.4, 3.1, 4.2- 4.4	• Interprets information from a range of sources to determine and adhere to communication and networking requirements

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Writing	1.1,1.5, 2.1, 2.3, 2.4, 3.1, 3.2, 4.2, 4.3	• Records notes from research and discussions for future reference • Develops materials for a specific audience according to organisational standards
Oral Communication	1.1-1.6, 2.3, 2.4, 3.3, 4.2-4.4	• Participates in spoken exchanges with a range of audiences using structure and language to suit the audience • Involves others in discussions using active listening and questioning techniques appropriately
Numeracy	2.4, 4.1	• Performs calculations to determine timeframes and measure actual performance against required standards
Navigate the world of work	2.3, 2.4	• Considers wider organisational goals when developing customer relationship strategies
Interact with others	1.1, 1.2, 1.5, 1.6, 3.3, 4.2-4.4	• Selects and uses appropriate conventions and protocols when communicating with clients or business contacts to build rapport, seek or present information • Recognises the need to alter personal communication style in response to the needs, values, beliefs and cultural expectations of others • Adapts personal communication style to build positive working relationships and show respect for the opinions, values and particular needs of others
Get the work done	1.1, 2.1-2.4, 3.1-3.3, 4.1-4.4	• Takes responsibility for planning, sequencing and implementing tasks and own workload to achieve business outcomes • Uses analytical processes to gather relevant information, identify and evaluate options and decide on appropriate systems and strategies • Actively monitors and evaluates effectiveness of decisions to identify and implement improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBREL402 Build client relationships and business networks	BSBREL402A Build client relationships and business networks	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBREL402 Build client relationships and business networks

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 clients' preferred communication styles and methods and potential barriers to communications and use appropriate communication styles and strategies
- apply communication techniques to establish rapport and promote two-way communication
- develop and implement client loyalty strategies and service standards based on business objectives and client information
- develop and implement strategies to elicit feedback from clients and use it to improve relationships and customer satisfaction
- maintain contacts and participate in formal and informal networks that support the business and enhance personal knowledge of the market.

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 strategies that can build client loyalty including those that focus on:
  - financial incentives and special offers
  - premium services and private/dedicated facilities
  - loyalty programs, rewards and recognition
- outline issues that are commonly addressed in client care/service standards in the industry
- outline typical barriers to communicating with clients and possible strategies to address them
- give examples of strategies for feedback
- describe the principles and techniques for effective communication and networking
- outline networking opportunities relevant to the business with reference to:

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  - government, industry and professional associations
  - trade shows, conferences, briefings and other professional development activities
  - existing groups or networks
  - businesses and individuals
- outline aspects of organisational policies, procedures and processes that are relevant to communicating with clients and participating in networks.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations - relationship management field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBREL403 Implement international client relationship strategies

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 a defined organisational strategy for developing international client relationships, marketing plans and marketing strategies for specified international target market.

It applies to individuals working with minimal supervision but with the support and assistance of a more senior person within the organisation.

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

Unit Sector

Business Development – International Business

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. Implement culturally appropriate interpersonal communication with clients	1.1 Seek advice on culturally appropriate interpersonal communication styles to use with international clients 1.2 Use culturally appropriate interpersonal communication styles with international clients 1.3 Seek feedback on appropriateness of communication style 1.4 Make changes to communication style as a result of feedback

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ELEMENT	PERFORMANCE CRITERIA
2. Implement client relationship strategy	2.1 Seek clarification of details of the existing organisational client relationship strategy as required 2.2 Determine processes and practices to implement the client relationship strategy with international clients 2.3 Implement the client relationship strategy with international clients 2.4 Identify issues and problems arising in implementing the client relationship strategy with international clients and take actions to address these issues
3. Monitor and improve client relationship strategy	3.1 Maintain records of client interactions according to organisational procedures 3.2 Seek feedback on quality and effectiveness of interactions with international clients 3.3 Identify and receive feedback on areas of improvement in international client interactions from monitoring processes 3.4 Make suggestions for changes in the organisation's client interaction strategy to relevant personnel 3.5 Implement areas of improvement to processes and practices associated with the client relationship strategy 3.6 Monitor changes made to processes and practices associated with the client relationship strategy for quality and effectiveness of interactions with international clients

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, 2.2, 2.3, 3.1	• Integrates information and ideas from a range of sources and critically analyses data to determine and maintain effective engagement methods and strategies
Writing	1.1, 1.2, 1.3, 2.1-2.4, 3.1-3.5	• Requests information using clear and detailed language in a format appropriate to audience and purpose • Records details accurately, using industry-specific

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		language in format required by the organisation
Oral Communication	1.1-1.4, 2.1, 2.3, 2.4, 3.1-3.4	• Engages with others using culturally appropriate language and non-verbal features • Uses active listening and questioning techniques to confirm understanding
Navigate the world of work	2.1, 2.4, 3.1, 3.4	• Understands own role in contributing to organisational strategic direction • Complies with organisational policies and objectives
Interact with others	1.1, 1.3, 2.1, 2.4, 3.2, 3.3, 3.4	• Uses a range of strategies to establish a sense of connection and build rapport with others • Identifies and explores differences in a diverse range of people in the work context and makes adjustments to communication in recognition of these differences
Get the work done	1.1, 1.3, 1.4, 2.1-2.4, 3.1-3.6	• Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes • Uses analytical processes to identify problems, gather relevant information, evaluate options and determine solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBREL403 Implement international client relationship strategies	BSBREL403A Implement international client relationship 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBREL403 Implement international client relationship strategies

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:

- demonstrate and use culturally appropriate communication styles across a range of clients
- demonstrate client interactions are in line with relationship strategy and contribute to business performance
- complete monitoring performance to make improvements to processes and practices
- demonstrate knowledge of cultural awareness relevant to international clients.

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 overview the knowledge of key provisions of relevant legislation that affects business operations, codes of practice and national standards
- explain cultural awareness relevant to international clients
- describe the application of an organisational client relationship strategy.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- office equipment
- resources
- relevant workplace documents
- feedback from clients.

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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

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BSBREL501 Build international client relationships

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 build effective international client relationships including analysing, identifying and applying culturally appropriate communication strategies.

It applies to individuals with managerial responsibility including planning, implementing and evaluating 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

Business Development – International Business

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. Build interpersonal communication strategies	1.1 Establish database of international clients applying relevant fields 1.2 Establish and note preferred mode of communication for international clients 1.3 Take into account the influence of geographic separation in establishing preferred mode of communication with international clients 1.4 Use a diary of communications with international clients to

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ELEMENT	PERFORMANCE CRITERIA
	provide a reminder to facilitate regular contact with international clients 1.5 Establish a record-keeping strategy for communications with international clients
2. Analyse and identify culturally appropriate communication strategies with clients	2.1 Identify sources of information relating to culturally appropriate styles of communication for specific cultural groups among international clients 2.2 Analyse and note, using available information sources, culturally appropriate styles of communication for specific cultural groups among international clients
3. Apply culturally appropriate communication strategies with clients	3.1 Use preferred client communication styles and modes of communication with international clients 3.2 Use culturally appropriate verbal and non-verbal communication processes to establish rapport with international clients 3.3 Use active listening to establish rapport with international clients 3.4 Investigate and act upon opportunities to offer positive feedback to clients 3.5 Use open questions to promote two-way communication 3.6 Identify and act upon potential barriers to effective communication with international clients taking into account cultural influences 3.7 Ensure communication processes initiated identify client needs, preferences and expectations
4. Maintain and improve relationships with international clients	4.1 Develop strategies to establish processes for obtaining ongoing feedback from international clients to monitor satisfaction levels using appropriate techniques 4.2 Use strategies developed to elicit feedback to provide information in a form that can be used to improve relationships with international clients 4.3 Use feedback obtained to develop and implement strategies to maintain and improve relationships with international clients 4.4 Review the effectiveness of communication with international clients on a regular basis

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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, 3.6	• Researches and critically analyses information from a range of sources to interpret communication and support resource requirements
Writing	1.1-1.5, 2.2, 3.1, 3.2, 4.1	• Develops workplace material ensuring vocabulary, grammatical structures and conventions are appropriate for the target audience
Oral Communication	3.2-3.6, 4.2	• Engages with others using culturally appropriate language and non-verbal features • Uses active listening and open questioning techniques to confirm understanding
Interact with others	1.2, 3.1-3.7, 4.2	• Implements strategies for a diverse range of clients to build rapport and foster strong relationships • Varies content, structure, style, tone and vocabulary to suit the needs of different audiences
Get the work done	1.1-1.5, 2.1, 2.2, 3.6, 4.1-4.4	• Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes • Uses analytical processes to identify problems, gather relevant information, evaluate options and determine solutions • Takes responsibility for the outcomes of routine decisions related directly to own role • Evaluates outcomes to reflect on the ways in which communications in an international context can be improved • Uses digital systems and tools to access, store and retrieve information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBREL501 Build international client relationships	BSBREL501A Build international client relationships	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBREL501 Build international client relationships

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 a database of clients and document a strategy for communicating with these clients
- build, maintain and improve relationships with international clients over time and keep a record of all communications
- analyse, identify and apply culturally appropriate communication strategies with international clients
- use feedback from international clients to review communication 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 the characteristics of specific cultural groups
- describe principles of communication theory, especially cross-cultural communication
- identify sources of information about relevant cultural groups
- explain some factors that contribute to culturally appropriate styles of communication
- explain common barriers to communication and how to address them
- outline processes for obtaining ongoing feedback from international clients.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development –international business field of work and include access to:

- office equipment and resources

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- relevant workplace documents
- feedback from clients
- international business networks
- 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

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BSBREL502 Build international business networks

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 build international business networks that benefit the business and its clients in a culturally appropriate way.

It applies to individuals with managerial responsibility for setting up, maintaining and reviewing participation in international business networks.

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

Unit Sector

Business Development – International Business

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. Develop and maintain appropriate international business networks	1.1 Allocate time to build and maintain international business networks 1.2 Identify opportunities to build international business networks 1.3 Use participation in international and Australian business associations, trade fairs, conferences and professional development activities to establish and maintain a network of support for the business and to enhance personal knowledge of international markets

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify and maximise opportunities to make face-to-face contact with overseas business associates and international business network members 1.5 Establish communication channels to exchange information and ideas with international business network members 1.6 Provide input to the network and seek and verify feedback
2. Reflect social and cultural awareness in developing and maintaining international business networks	2.1 Identify sources of information relating to social and cultural awareness for specific cultural groups within current and prospective network membership 2.2 Analyse and note sources of information relating to social and cultural awareness for specific cultural groups within current and prospective network membership using available information sources 2.3 Use communication styles and social mores appropriate to specific cultural groups in relating to individuals and groups within the network 2.4 Review the quality of communication and relationships with network members on a regular basis to determine effectiveness of communication styles and interactions
3. Review own participation in international business networks	3.1 Estimate and document costs of own participation in international business networks 3.2 Quantify and document the value of outcomes derived from participation in international business networks 3.3 Analyse the value of outcomes derived from participation in international business networks in comparison to costs of participation 3.4 Ensure that decisions are made and implemented to increase, maintain or decrease participation in networking activity as a result of review 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

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Reading	1.2, 1.3, 2.1, 2.2, 2.4, 3.3	• Interprets, analyses and evaluates complex information in texts to identify ways to build and maintain networks
Writing	1.5, 2.2, 2.4, 3.1, 3.2	• Develops a range of texts relating to network management using vocabulary, grammatical structures and conventions appropriate to the context and target audience • Records details of appropriate information sources for future reference
Oral Communication	1.3, 1.6, 2.3, 2.4	• Participates in verbal exchanges of ideas with a range of audiences using appropriate structure and language • Uses questioning and active listening to request feedback or to clarify or confirm understanding
Numeracy	3.1-3.3	• Uses a limited range of mathematical calculations to calculate and reconcile amounts and evaluates and compares numerical information
Interact with others	1.3, 1.5, 1.6, 2.3, 2.4, 3.2	• Establishes and uses appropriate conventions and protocols when communicating with diverse network members • Adapts personal communication style to show empathy and respect for the opinions, values and particular needs of others • Implements strategies to build rapport and foster strong relationships
Get the work done	1.1-1.6, 2.1-2.4, 3.1-3.4	• Plans, organises and implements tasks to achieve networking objectives, changing plans when necessary • Systematically gathers and analyses all relevant information and evaluates options in order to determine effectiveness of information sources, communication methods and participation in networks • Uses digital tools to gather, store, access or share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBREL502 Build international business networks	BSBREL502A Build international business networks	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBREL502 Build international business networks

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 opportunities for contact with international business people including:
  - government, industry and professional associations
  - trade fairs
  - conferences
  - professional development activities
  - informal and formal networks
- contribute to international business contacts and networks that support the organisation and develop own knowledge of international markets
- maximise opportunities for contact and exchange of business related information with network members and note the business and interpersonal outcomes
- analyse information from a range of sources to identify the cultural and social norms of current and prospective network members
- reflect social and cultural awareness in relationships and communications with network members
- review participation in networks including:
  - the value of business and interpersonal outcomes
  - other benefits
  - costs
  - quality and effectiveness of personal communication styles and interactions
- recommend whether to maintain, increase or decrease participation in networks and follow through to ensure decisions are made.

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

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Knowledge Evidence

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

- outline internal and external sources of information that can inform an understanding of diverse social and cultural groups
- give examples of existing international business networks and explain their potential value to the organisation
- outline the legislative and regulatory context relevant to international business networks
- explain the principles of communication theory with reference to cross-cultural communication
- outline aspects of organisational policies, procedures and processes that are relevant to participation in networks.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – international business field of work and include access to:

- international business networks
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with people from diverse social or cultural backgrounds.

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

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BSBRES401 Analyse and present research information

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 gather, organise, analyse and present workplace information using available systems. 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.

It applies to individuals who are required to apply their broad knowledge of the work environment to analysis and research tasks, evaluate information from a variety of sources and apply solutions to a range of unpredictable problems

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

Unit Sector

Knowledge Management – Research

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. Gather and organise information	1.1 Gather and organise information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements 1.2 Access information held by the organisation ensuring accuracy and relevance in line with established organisational requirements 1.3 Ensure that methods of collecting information are reliable and

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ELEMENT	PERFORMANCE CRITERIA
	make efficient use of resources in accordance with organisational requirements 1.4 Identify research requirements for combining online research with non-electronic sources of information 1.5 Use business technology to access, organise and monitor information in accordance with organisational requirements 1.6 Update, modify, maintain and store information, in accordance with organisational requirements
2. Research and analyse information	2.1 Clearly define objectives of research ensuring consistency with organisational requirements 2.2 Ensure that data and research strategies used are valid and relevant to the requirements of the research and make efficient use of available resources 2.3 Identify key words and phrases for use as part of any online search strategy, including the use of Boolean operators and other search tools 2.4 Use reliable methods of data analysis that are suitable to research purposes 2.5 Ensure that assumptions and conclusions used in analyses are clear, justified, supported by evidence and consistent with research and business objectives
3. Present information	3.1 Present recommendations and issues in an appropriate format, style and structure using suitable business technology 3.2 Structure and format reports in a clear manner that conforms to organisational requirements 3.3 Report and distribute research findings in accordance with organisational requirements 3.4 Obtain feedback and comments on suitability and sufficiency of findings in accordance with 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	Performance Criteria	Description

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Reading	1.1, 1.2, 1.4, 2.1-2.5, 3.4	• Analyses and evaluates textual information to develop research strategies, integrate facts and ideas and meet organisational requirements
Writing	1.1, 1.5, 1.6, 2.1, 3.1, 3.2, 3.3	• 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	3.3, 3.4	• Presents recommendations and issues using language appropriate to audience and according to organisational requirements
Numeracy	1.1, 1.2, 1.3, 2.2, 2.4, 3.3	• Extracts and evaluates meaning from data and interprets numerical information to apply within the context of requirements
Navigate the world of work	1.2, 1.3, 1.5, 1.6, 2.1, 2.5, 3.2, 3.3, 3.4	• Recognises and follows organisational policies and procedures and meets expectations associated with own role
Interact with others	3.3, 3.4	• Selects and uses appropriate communication practices when seeking or sharing information
Get the work done	1.1, 1.4, 1.5, 2.2, 2.3, 2.4, 3.1	• Plans, organises and implements tasks to meet organisational requirements • Takes responsibility for the outcomes of routine decisions related directly to own role • Uses the main features and functions of digital technologies and tools to complete work tasks • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRES401 Analyse and present research information	BSBRES401A Analyse and present research information	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBRES401 Analyse and present research information

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 or confirm research requirements and objectives
- gather, organise and present workplace information and data
- update, modify, maintain and store information
- maintain and handle data and documents systematically and securely
- prepare and produce reports including:
  - recommendations based on the analysis of information
  - clear and justified assumptions and conclusions
  - use of efficient, valid and reliable methods
- use Boolean operators and other search tools
- analyse, evaluate and interpret data to support organisational 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:

- explain organisational systems for recordkeeping/filing, including security procedures
- identify organisational policies and procedures and legal and ethical obligations relating to workplace information
- explain concepts related to research and analysis including reliability and validity
- give examples of techniques for data analysis and how they are applied
- explain research processes and strategies to identify new sources (online and print) of information and to use them most efficiently and effectively.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – research field of work and include access to:

- workplace information systems, equipment and resources
- workplace policies and 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

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BSBRES404 Research legal information using primary sources

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 under supervision researching primary sources of legal information, locating relevant information and writing up a basic summary.

It 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

Knowledge management – research

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. Receive and 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 Research and identify appropriate response methods and

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ELEMENT	PERFORMANCE CRITERIA
	format 1.5 Forward request for information to others where appropriate
2. Identify information sources	2.1 Identify and research relevant sources and locations of information 2.2 Obtain access to identified sources 2.3 Resolve problems with accessing information promptly and efficiently
3. Prepare to extract information	3.1 Locate and extract information relevant to particular request 3.2 Discuss and implement resolutions to problems in accessing information with designated person where appropriate 3.3 Copy extracted information according to organisation's security and confidentiality procedures 3.4 Maintain integrity of content/information
4. Ensure information meets request	4.1 Analyse, evaluate and edit extracted information to fit client needs 4.2 Combine different types of information, where appropriate, to provide response to request
5. Compose report or correspondence	5.1 Develop plan and synopsis for report or correspondence 5.2 Write report or correspondence using clear and concise language 5.3 Check spelling, punctuation and grammar, and amend where necessary
6. Prepare to format report or correspondence	6.1 Format report or correspondence according to organisation's requirements, policies and procedures 6.2 Check report or correspondence for accuracy and to ensure that intended meaning will be readily understood by recipient
7. Finalise report or correspondence	7.1 Arrange review and sign-off of report or correspondence with designated person within designated timelines 7.2 Apply organisation's information-recording procedures 7.3 Forward report or correspondence to client

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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, 4.1, 5.3, 6.1, 6.2	• Interprets 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	1.1, 1.2, 1.5, 3.4, 4.1, 4.2, 5.1, 5.2, 5.3, 6.1, 6.2, 7.2	• 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	1.2, 1.3, 3.2, 7.1	• Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding
Navigate the world of work	3.3, 6.1, 7.2	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Interact with others	1.2, 1.3, 3.2, 7.1, 7.3	• Selects and uses appropriate conventions and protocols when sharing information with others
Get the work done	1.3, 1.4, 2.2, 2.3, 3.1, 3.2, 5.1, 6.1, 7.1	• Plans, organises and implements tasks to meet organisational requirements • Uses the main features and functions of digital technologies and tools to complete work tasks • Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRES404 Research legal information using primary sources	BSBRES404A Research legal information using primary sources	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

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Assessment Requirements for BSBRES404 Research legal information using primary sources

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 correct procedures for receiving, documenting and processing requests for information
- source and access information that meets the requirements of the request
- process and format information correctly and in accordance with organisational policies and procedures, particularly with regard to security and confidentiality
- finalise documents within designated timelines and according to organisational procedures.

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 organisation's policies and procedures that must be followed when completing the the full range of tasks covered
- list relevant information sources and for each source briefly explain:
  - how each source is accessed
  - the type of information
- briefly explain the legislative requirements that apply when researching, accessing and using legal information.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – research field of work and include access to:

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- appropriate legislation and regulations relevant to common legal matters
- organisational policies and procedures for formatting of documents, security and confidentiality
- office equipment and resources
- 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

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BSBRES502 Research legal information using secondary sources

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 legal research using secondary sources and 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.

It 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

Knowledge management – research

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. Identify specific legal data and information requirements	1.1 Liaise with designated person to clarify specific legal data and information needs 1.2 Prepare research plan and prioritise activities 1.3 Identify resources and technical requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Assign timelines to tasks and delegate tasks where appropriate
2. Undertake research	2.1 Identify sources of legal data and information 2.2 Research and identify key information to be extracted
3. Review research	3.1 Check information to ensure that extracted details are acknowledged and recorded for copyright and other legal requirements 3.2 Analyse legal data and information for relevance to facts 3.3 Edit and collate legal data and information to fit research and relevant legal and ethical requirements
4. Prepare drafts	4.1 Draft document in appropriate format taking into account precedent documents and using appropriate language 4.2 Present legal data and information according to organisation's policies and procedures and legal requirements 4.3 Evaluate draft against previously identified criteria and take action to address identified gaps or deficits 4.4 Liaise with supervisor to review document 4.5 Make amendments where necessary
5. Prepare final draft	5.1 Identify key points and prepare executive summary, where appropriate 5.2 Prepare appendices, bibliography and table of contents as required 5.3 Check final draft and present it to supervisor for review and sign-off 5.4 Make arrangements to disseminate 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	Performance Criteria	Description
Reading	1.2, 1.3, 1.4, 2.1, 2.2, 3.1, 3.2, 3.3,	• Interprets documents to determine legal requirements • Identifies and analyses complex texts to assess

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	4.1, 4.3, 5.1, 5.3	relevance to research task • Compares prepared drafts against criteria to evaluate whether it meets requirements • Proofreads documents for accuracy of content, layout, grammar, spelling and punctuation
Writing	1.2, 1.3, 1.4, 2.2, 3.1, 3.3, 4.1, 4.2, 4.5, 5.1, 5.2	• Documents research plans in accordance with organisational or regulatory requirements • Composes and edits texts, selecting appropriate vocabulary, structure and format for audience and purpose
Oral Communication	1.1, 1.4, 4.4	• Explains issues and requirements clearly and obtains information from others by listening and questioning
Numeracy	1.4	• Analyses task requirements to calculate the duration of activities
Navigate the world of work	3.1, 3.3, 4.2	• Appreciates the implications of legal and regulatory responsibilities related to own work
Interact with others	1.1, 1.4, 4.4	• Collaborates with others to achieve required outcomes • Selects and uses appropriate communication practices and conventions for the purpose and audience
Get the work done	1.2, 1.3, 1.4, 4.3, 5.3, 5.4	• Plans, prioritises, organises and implements tasks to meet organisational requirements, liaising with others when required • Systematically analyses information against set criteria in order to decide on amendments needed to draft reports • 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**
BSBRES502 Research legal information using secondary sources	BSBRES502A Research legal information using secondary sources	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for BSBRES502 Research legal information using secondary sources

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:

- prepare a research plan including
  - liasing with others to clarify needs or to delegate tasks
  - prioriting required tasks
  - identifying resources, technical requirements and timelines
- conduct research using secondary sources according to organisational and legal requirements
- edit research findings and use relevant information to prepare draft report
- review draft, seek feedback from relevant person(s) and implement modifications
- produce a final report using appropriate format and language, according to the requirements of the request and within agreed timelines

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:

- list and describe sources of legal data and information
- explain some situations where there would be an obligation to refer matters to supervisors and/or obtain sign-off on legal work
- briefly explain the organisation’s policies and procedures relating to researching, accessing and using legal information
- briefly explain the legislative requirements that apply when researching, accessing and using legal information
- describe the format for presenting written reports

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – research field of work and include access to:

- appropriate legislation and regulations relevant to common legal matters
- workplace documentation and resources
- case studies and, where possible, real situations
- secondary research sources for legal matters.

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

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BSBRES801 Initiate and lead applied research

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, 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.

It applies to leaders or managers using applied research to ensure learning can 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

Knowledge Management – Research

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. Construct an applied research strategy	1.1 Clarify and confirm applied research purpose and needs of the target group 1.2 Determine policies and procedures in relation to conducting applied research 1.3 Establish mechanisms for collecting and maintaining data in a

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ELEMENT	PERFORMANCE CRITERIA
	systematic manner 1.4 Analyse factors affecting the reliability and validity of data 1.5 Review relevant research ethics and codes of conduct 1.6 Prepare applied research strategy and hypothesis 1.7 Frame a research strategy in consideration of available tools and resources
2. Use a range of applied research techniques	2.1 Review and evaluate a range of applied research methods, theories and data collection techniques 2.2 Select appropriate methods to gather and analyse data 2.3 Use suitable technology and technology services to support data collection and analysis 2.4 Access appropriate sources of information and contributors relevant to the research 2.5 Optimise relevance of the research through 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 learning strategy 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 audience needs 3.5 Identify the need for and an appropriate approach to, further research

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	3.5	• Evaluates and reflects on the need for further research to contribute to ongoing organisational improvement

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Reading	1.1, 1.2, 1.5, 2.4, 3.1, 3.2	• Collects, analyses, compares and evaluates textual information from a range of resources to inform research strategies
Writing	1.6, 3.3, 3.4	• 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	1.1, 3.4	• Uses specialised vocabulary appropriate to context and audience to discuss and confirm research requirements • Applies listening and questioning techniques to check or confirm understanding
Numeracy	3.2, 3.3	• Applies knowledge of mathematical information to statistically analyse data and identify possible trends and confirm reliability
Navigate the world of work	1.2, 1.5, 3.2	• Is highly autonomous, taking 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 possibly for others
Interact with others	3.4	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a diverse range of communication practices to achieve goals
Get the work done	1.1, 1.2, 1.3, 1.7, 2.1, 2.2, 2.3, 2.4, 2.5, 3.3	• Develops plans for complex activities, regularly reviewing priorities and performance during implementation, identifying and addressing issues as they arise • Considers the strategic and operational potential of digital trends to achieve work goals, enhance work processes, create opportunities and enhance or reduce risks • Uses formal analytical thinking to make informed decisions about research strategies and techniques, seeking input, advice and feedback as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRES801 Initiate and lead applied research	BSBRES801A Initiate and lead applied research	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

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Assessment Requirements for BSBRES801 Initiate and lead applied research

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, conduct and report on applied research relevant to organisational strategic practices and outcomes
- 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
- design an applied research project using applied research tools and techniques
- document and present research findings including analysis of data, valid and reliable findings and recommendations for further research.

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 communication processes and methods
- explain data collection and analysis methods including the use of technology and technology services
- explain legal requirements, policies, procedures and guidelines relating to research including handling and storing data, privacy and freedom of information
- describe presentation techniques

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- describe reporting methods
- explain research ethics and codes of conduct
- give examples of applied research tools and methods and how they are applied.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – research field of work and include access to:

- business technology
- relevant workplace policies and procedures
- relevant legislation and codes of conduct
- 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

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BSBRKG301 Control records

Modification History

Release	Comments
Release1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to classify, register, and track records and information about records within a business or records system.

It applies to individuals who follow guidelines and processes to make judgements on record status and classification. They work under supervision or in consultation with more senior staff to support effective recordkeeping and governance practices across the organisation.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Identify records for capture	1.1 Categorise incoming material and identify records, metadata and formats for capture 1.2 Assess incoming material against organisational checklist for determining what material needs to be captured 1.3 Administer material which does not need to be registered 1.4 Locate, remove or copy record, when action is complete, from the active business or records system

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ELEMENT	PERFORMANCE CRITERIA
2. Classify records	2.1 Match identified transaction, action or activity documented by records to organisation's classification scheme 2.2 Select full classification and sentencing of records in accordance with the system's rules and organisational procedures 2.3 Link classified or sentenced records to other records in business or records system 2.4 Select indexing points (cross-reference terms) for records in accordance with system's rules and organisational procedures
3. Register records	3.1 Select and record unique identifiers for records in accordance with business or records system rules and procedures 3.2 Register records into business or records system 3.3 Document and forward records to appropriate locations or officers, observing any special handling requirements of the record format
4. Track records	4.1 Determine unique identifiers of records from requests or instructions 4.2 Obtain storage location, history and information of records from business or records system 4.3 Update and amend information about records 4.4 Complete all transactions within designated timeframes 4.5 Complete and obtain appropriate documentation or reports
5. Audit records	5.1 Locate records with action officer and in storage areas, in accordance with supervisor's instructions 5.2 Audit records against predetermined criteria in accordance with organisational procedures and quality program 5.3 Document and report any discrepancies

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

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Reading	1.1, 1.2, 2.1, 2.2, 2.4, 4.1, 4.3, 4.4, 5.2	• Interprets information from a range of texts to determine organisational requirements • Reviews records against set criteria to identify discrepancies
Writing	3.1-3.3, 4.3, 4.4, 4.5, 5.2, 5.3	• Documents, updates and amends information accurately and in required format • Prepares reports according to organisational requirements
Oral Communication	4.1, 5.1, 5.3	• Uses active listening and questioning techniques to confirm requirements and clarify information • Uses clear language, appropriate to audience, to circulate information
Numeracy	3.1, 3.2, 5.2	• Recognises and uses numerical record-keeping systems • Recognises and compares numerical data embedded in records
Navigate the world of work	2.2, 2.4, 3.1, 5.2	• Takes some personal responsibility for following organisational procedures and protocols
Interact with others	3.3, 4.1, 4.5, 5.1, 5.3	• Chooses appropriate method and format for communicating and seeking information
Get the work done	1.1-1.4, 2.1-2.4, 3.1, 3.2, 4.1, 4.2, 4.4, 4.5	• Plans routine tasks according to set procedures, taking some responsibility for timing • Takes responsibility for routine low-impact decisions within familiar situations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG301 Control records	BSBRKG301B Control records	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

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Assessment Requirements for BSBRKG301 Control records

Modification History

Release	Comments
Release1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- register and track the location of records using appropriate processes for capture and classification
- identify activities documented by records
- apply classification schemes
- record metadata accurately.

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 general principles and processes of records management and records management systems
- describe the organisational business functions, structure and culture
- explain the key details of organisational policies, strategies and procedures, that relate to records access and security.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBRKG302 Undertake disposal

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 which records are subject to a disposal program, and to safely and securely transfer or dispose of the records.

It applies to individuals who follow guidelines and processes to assist them to make judgements on the status and classification of records. They work under supervision or in consultation with more senior staff to support effective recordkeeping and governance practices across the organisation.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Conduct a records survey	1.1 Plan a records survey to identify records and formats for disposal 1.2 Inform users of the business or records system of the need for their participation to identify and assess records and formats for disposal 1.3 Gather required data about records in accordance with the

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ELEMENT	PERFORMANCE CRITERIA
	predetermined methodology and user requirements 1.4 Assess records to determine disposal status 1.5 Present findings of survey to inform users of proposed disposal processes and requirements 1.6 Undertake quality control measures in accordance with organisational procedures, to ensure consistency in determining disposal status and retention periods
2. Undertake disposal actions	2.1 Seek approval from appropriate individual/body for disposal actions 2.2 Destroy records which are no longer required for any purpose, in accordance with approval and organisational procedures 2.3 Store records which need to be kept for a further period, in accordance with legal obligations and organisational records storage requirements 2.4 Store original vital records, and copies of vital records where applicable, in accordance with organisational procedures and vital records strategy 2.5 Record and authorise all disposal actions in accordance with legal obligations, organisational procedures and business or records system rules
3. Maintain control of records	3.1 Prepare disposal documentation by recording the unique identifiers of the records to be disposed of in a form compliant with organisational rules and procedures for the transfer of custody, ownership and/or responsibility, or destruction of records 3.2 Prepare records for transfer in accordance with storage medium requirements 3.3 Retain identifying documentation for transfer as part of organisational records and forward a copy to the recipient 3.4 Document transit locations for records to be moved in the location control system, where applicable 3.5 Maintain identifying documentation for destroyed records as part of organisation records where appropriate
4. Transfer records	4.1 Determine method, timeframe and personnel to undertake the movement in accordance with the organisational procedures and record requirements 4.2 Document relocation of records in the location control system and other systems, in accordance with organisational procedures 4.3 Complete and document the movement of records in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with the organisational procedures 4.4 Obtain proof of receipt and forward to appropriate authority where it is required
5. Destroy records	5.1 Determine method, timeframe and personnel to undertake the destruction, in accordance with organisational procedures and record requirements 5.2 Document destruction of records in the location control system and other systems, in accordance with organisational procedures 5.3 Complete and document destruction of records in accordance with legal requirements and organisational procedures 5.4 Destroy records under secure conditions

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, 1.6, 2.2-2.5, 3.1, 3.2, 4.1, 4.2, 4.3, 5.1-5.3	• Identifies and extracts information from record storage system to identify, classify and assess status of records • Identifies and interprets textual information from different sources to determine how information may be applied to job requirements
Writing	1.2, 1.5, 2.1, 2.5, 3.1, 3.2, 3.4, 3.5, 4.2, 4.3, 5.2, 5.3	• Completes or updates organisational documentation using industry related terminology and required format • Provides information to others using words and format appropriate to audience and context
Oral Communication	1.2, 1.4, 1.5, 2.1	• Participates effectively in interactions with others using words and non-verbal features appropriate to audience and context • Uses questioning and active listening techniques to confirm requirements
Numeracy	3.1, 3.5, 4.1	• Recognises and uses numerical systems associated with recordkeeping systems • Makes basic time calculations to schedule activities in the workplace
Navigate the	1.6, 2.2-2.5, 3.1, 4.1,	• Takes personal responsibility for following

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world of work	4.2, 4.3, 5.1, 5.2, 5.3, 5.4	organisational policies, procedures and legislative requirements
Interact with others	1.2, 1.5, 2.1, 3.3, 4.4	• Chooses appropriate method and format for communicating and seeking information
Get the work done	1.1, 1.3, 1.4, 1.6, 2.2, 2.3, 2.4, 2.5, 3.2, 3.3, 3.4, 3.5, 4.1, 4.4, 5.1	• Plans and implements routine tasks according to set requirements, taking some responsibility for timing • 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**
BSBRKG302 Undertake disposal	BSBRKG302B Undertake disposal	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

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Assessment Requirements for BSBRKG302 Undertake disposal

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:

- assess records to identify disposal status
- record and control processes as part of a disposal program
- dispose of identified records safely and securely in compliance with relevant legislation, regulations and standards.

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 the key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect record disposal
- identify the general principles and explain the processes of records management and records management systems
- describe the organisational business functions, structure and culture
- explain the key details of organisational policies, strategies and procedures that relate to description, disposal and storage of records.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBRKG303 Retrieve information from records

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 receive a request and to deliver the record or information about the record.

It 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

Knowledge Management – Recordkeeping

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. Locate/retrieve records required	1.1 Identify and refine search criteria and keywords (or other control information) to retrieve records, in consultation with person making request 1.2 Adopt a systematic approach to details that are difficult to determine 1.3 Search business or records system to retrieve records according to agreed criteria

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Locate or retrieve records to match request
2. Ensure security of records	2.1 Identify person requesting the record and confirm the access category, in accordance with organisational procedures 2.2 Check security and access clearance documents to match with category of identified person requesting the record 2.3 Where necessary, inform user of access denial in accordance with organisational procedures
3. Provide required information or records	3.1 Mask specific records, or portions thereof, to prevent access where required 3.2 Prepare information for person requesting the record in an appropriate format 3.3 Deliver record, or record information, within the specified timeframes 3.4 Document the 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, 1.3, 2.1, 2.2, 3.1	• Identifies, interprets, checks and compares a range of information to inform effective and compliant actions
Writing	1.1, 2.3, 3.2, 3.4	• Accurately inputs information and documents details of record retrieval process • Prepares required information in accordance with organisational procedures
Oral Communication	1.1, 2.1, 2.3	• Asks questions and listens to responses to confirm and clarify requests • Provides information according to organisational procedures
Numeracy	1.3	• Recognises and uses numerical systems associated with recordkeeping systems
Navigate the world of work	2.1, 2.3	• Takes some personal responsibility for following organisational procedures

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Get the work done	1.1-1.4, 2.1, 2.2, 3.1, 3.3	• Plans and implements routine tasks according to set processes, taking some responsibility for timing • Takes responsibility for the outcomes of routine decisions related directly to own role • Understands the importance of secure information and takes some responsibility for identifying and managing risk factors

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG303 Retrieve information from records	BSBRKG303B Retrieve information from records	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

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Assessment Requirements for BSBRKG303 Retrieve information from records

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 system users to identify information requirements and locate records
- maintain accuracy in recording information
- provide appropriate information and responses to requests.

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 organisational procedures for records retrieval and security
- identify the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
  - environmental context
  - records characteristics.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- 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

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BSBRKG304 Maintain business records

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 maintain the records of a business or records system in good order on a day-to-day basis.

It 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 system users to support effective recordkeeping and governance practices across the organisation.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Collate business records	1.1 Identify individual records or information which should be incorporated into business or records system according to organisational criteria 1.2 Sort records in accordance with workplace requirements 1.3 Follow security and access requirements in accordance with organisational procedures

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ELEMENT	PERFORMANCE CRITERIA
2. Update business or records system	2.1 Identify and record control information for describing new records to be incorporated into business or records system 2.2 Update control information describing movement or use of records within business or records system 2.3 Accurately record and update control information in business or records system 2.4 Identify and remove records of completed business activities from current system for disposal
3. Prepare reports from the business or records system	3.1 Interpret requests for reports and clarify the content and frequency sought, where necessary 3.2 Prepare reports from business or records system in accordance with instructions or request 3.3 Prepare reports in accordance with organisational security and access 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 Criteria	Description
Reading	1.1, 1.3, 2.1, 2.4, 3.1	• Gathers and interprets textual information from different sources to determine how information may be applied to job requirements
Writing	2.1, 2.2, 2.3, 3.1	• Uses clear and industry related terminology to complete and update workplace information
Oral Communication	3.1	• Uses questioning and active listening techniques to confirm job requirements
Numeracy	1.1	• Recognises and uses numerical systems associated with recordkeeping systems
Navigate the world of work	1.3, 3.3	• Takes some personal responsibility for following organisational procedures
Get the work done	1.1, 1.2, 2.1, 2.3, 2.4, 3.2	• Takes responsibility for planning and organising own workload to ensure work deadlines are met • Takes responsibility for the outcomes of routine

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		decisions related directly to own role

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG304 Maintain business records	BSBRKG304B Maintain business records	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

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Assessment Requirements for BSBRKG304 Maintain business records

Modification History

Release	Comments
Release1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- collate business records in compliance with organisational procedures and workplace requirements
- record and update control information accurately in business records 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 the organisational requirements regarding the maintenance and security of business records
- describe the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
  - environmental context
  - records characteristics.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources

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- 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

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BSBRKG305 Review recordkeeping functions

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 research that supports work across a wide range of recordkeeping functions.

It applies to individuals who use a range of analytical and documenting techniques to perform their work and support effective recordkeeping and governance practices across the organisation.

This unit is based on the 'Statement of Knowledge for Recordkeeping Professionals' jointly produced by the Australian Society of Archivists Inc. (ASA) and Records and Information Management Professionals Australasia (RIM Professionals Australasia).

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

Unit Sector

Knowledge Management – Recordkeeping

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. Research records and recordkeeping systems	1.1 Identify purpose of records and recordkeeping systems 1.2 Define characteristics of records 1.3 Select appropriate recordkeeping system characteristics

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Research theories and principles of recordkeeping
2. Review recordkeeping context	2.1 Define environmental context of records and recordkeeping systems 2.2 Research factors which may influence present or future needs of records or recordkeeping systems 2.3 Identify needs of stakeholders, agents and users of records 2.4 Research theories and principles relating to recordkeeping environment or context
3. Document recordkeeping processes and practices	3.1 Collate, analyse and document recordkeeping processes and practices 3.2 Write report on outcomes of research 3.3 Develop recommendations for future activity

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, 2.2, 2.4, 3.1	• Identifies, interprets, analyses and evaluates a range of information sources
Writing	1.2, 1.4, 2.1-2.4, 3.1-3.3	• Documents results of analysis, research outcomes and ideas matching writing style to purpose and audience • Selects vocabulary, grammatical structures and conventions appropriate to the text and audience
Oral Communication	2.3	• Communicates verbally to identify needs of stakeholders, agents and users • Asks questions to clarify and confirm understanding and listens to responses
Numeracy	1.2, 1.4, 2.3, 3.3	• Recognises and uses numerical systems associated with record storage systems
Get the work done	1.1, 1.2, 2.1, 2.3, 3.1, 3.3	• Plans and organises tasks required to document recordkeeping practices • Uses problem-solving skills to interpret records management principles and practices and decide on recommendations

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG305 Review recordkeeping functions	BSBRKG305A Review recordkeeping functions	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

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Assessment Requirements for BSBRKG305 Review recordkeeping functions

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:

- write a report that details the recordkeeping functions, processes and practices of a recordkeeping 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 the basis theories and principles of recordkeeping
- explain the requirements of good recordkeeping practices
- describe factors which may influence present or future needs.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBRKG401 Review the status of a record

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 review and document the changing context and status of records identified as having temporary or ongoing value, and requiring conditions for access.

It applies to individuals who follow business records system guidelines and processes to assist them to make informed judgments on the status and classification of records. They work under supervision or in consultation with more senior staff or system users.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Identify classes of records justifying review	1.1 Compile and review a list of the criteria for review to be met by records and formats 1.2 Apply the records in the subject jurisdiction criteria 1.3 Identify and document the records that meet the criteria
2. Review disposal authority and access	2.1 Identify disposal authority, disposal class references and any access and security conditions for records, in accordance with

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ELEMENT	PERFORMANCE CRITERIA
conditions	industry practice 2.2 Identify and document records for which neither a disposal authority nor an access restriction exist, in accordance with industry practice 2.3 Assemble copies of related appraisal reports and access conditions for analysis 2.4 Make comparisons and take notes of any anomalies arising from the comparison, and recommend changes to existing disposal authorities and access conditions
3. Prepare new appraisal reports	3.1 Prepare new appraisal reports including reference to criteria justifying the review 3.2 Make new interpretations of existing access criteria taking into account new criteria to be applied to the review 3.3 Distribute new appraisals and access interpretations to appropriate stakeholders for comment, and submit for approval
4. Implement recommendations and re-interpretations	4.1 Prepare methodology for implementation and assemble necessary resources 4.2 Produce and circulate revised disposal authorities and access conditions 4.3 Document progress throughout implementation and record any issues or implications arising from revised disposal authorities and access conditions 4.4 Document implementation process and outcomes in organisation’s business or recordkeeping systems

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	• Identifies, compares and reviews information to identify inconsistencies and opportunities for changes to record status
Writing	1.1, 1.3, 2.2, 2.4,	• Develops documents using industry specific language and required formats

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	3.1, 3.3, 4.2-4.4	• Provides and requests information from others using language and structure appropriate for the audience
Oral Communication	3.3	• Communicates using language suited to audience to convey information and get feedback
Numeracy	1.1, 4.4	• Identifies numerically expressed sequences and interprets numerically expressed information
Navigate the world of work	1.2, 2.1, 2.2, 3.1	• Takes personal responsibility for following organisational protocols and procedures
Interact with others	3.3, 4.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 4.1	• Takes responsibility for planning, organising and implementing tasks required to achieve organisational requirements • Takes responsibility for the outcomes of routine decisions related directly to own role • Initiates standard procedures when responding to familiar problems within immediate context • Uses digital systems and tools to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG401 Review the status of a record	BSBRKG401B Review the status of a record	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

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Assessment Requirements for BSBRKG401 Review the status of a record

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:

- review the status of records against set criteria
- prepare and distribute new appraisal reports
- document new implementation process and outcomes
- document the implications of changes to the disposal status of records in the organisation's recordkeeping systems.

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 general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- define issues that relate to a review of records
- explain the organisational policies, strategies and procedures that relate to records access and security.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant workplace documentation and resources
- 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

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BSBRKG402 Provide information from and about records

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 effective responses to enquiries from potential users of records, using appropriate processes to access and provide information about records.

It 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

Knowledge Management – Recordkeeping

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. Identify and gather records required	1.1 Identify specific information or search criteria required by user 1.2 Identify range of records likely to contain information required and find out their availability using appropriate finding aids and records systems 1.3 Obtain range of records likely to contain information required by user, and analyse content 1.4 Track records to identify and record any change in location and use, in accordance with business or records system rules and

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ELEMENT	PERFORMANCE CRITERIA
	organisational procedures 1.5 Explain to user any obstacles to obtaining specific records within specified time and reach agreement on a timeframe for provision of records
2. Interpret and administer access rules and procedures	2.1 Identify person requesting record/s and confirm access category, in accordance with organisational procedures 2.2 Apply access restriction rules and guidelines to record/s requested to match access category of person requesting record/s 2.3 Inform person requesting record/s of their rights to review the decision where access restriction rules and guidelines prevent access
3. Provide the required information and/or records	3.1 Prepare requested information/records in appropriate formats, and in accordance with organisational procedures and specified timelines 3.2 Mask specific records, or portions thereof, in accordance with access rules and organisational procedures 3.3 Document records retrieved and used to provide information, in accordance with business or records system operation and organisational procedures 3.4 Record new locations provided to user in accordance with system rules and organisational procedures 3.5 Deliver record, or record information, within specified timeframes

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, 2.2	• Identifies and interprets information from a variety of organisational and regulatory texts to determine required actions
Writing	1.2, 1.4, 1.5, 2.3, 3.1, 3.3, 3.4	• Prepares information for others in required organisational format • Inputs information to locate records and records details

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		of documents according to organisational requirements
Oral Communication	1.1, 1.5, 2.1, 2.3	• Communicates verbally to gather or provide information using language appropriate to audience
Numeracy	1.2, 1.3, 1.5	• Recognises and interprets numerical information relating to record storage systems, record classification, timeframes and dates
Navigate the world of work	1.4, 2.1, 2.2, 3.1, 3.2, 3.3, 3.4	• Understands and adheres to organisational policies and procedures
Get the work done	1.1, 1.2, 1.3, 1.4, 1.5, 2.1, 3.1, 3.5	• Takes responsibility for planning, organising and implementing tasks required to achieve organisational requirements in a timely fashion • Takes responsibility for the outcomes of routine decisions related directly to own role • Uses digital systems and tools to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG402 Provide information from and about records	BSBRKG402B Provide information from and about records	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

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Assessment Requirements for BSBRKG402 Provide information from and about records

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 records which accurately fulfil users' requests in specified timeframes
- apply access and security rules to the provision of records
- complete documentation required for record retrieval including new location.

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 identification system used by the organisation to name, code, locate and categorise records
- explain the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
  - environmental context
  - records characteristics
- explain organisational policies, strategies and procedures that relate to records access and security.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant workplace documentation and resources
- 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

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BSBRKG403 Set up a business or records system for a small business

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 research, develop and implement business or records systems for a small office.

It applies to individuals who use a range of organisational, analytical and communication techniques to carry out the responsibilities of their role and report the outcomes 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

Knowledge Management – Recordkeeping

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. Determine recordkeeping requirements	1.1 Identify and document core business, supporting activities, resources, and business and social context using observation and consultation 1.2 Determine security and access requirements for business or records system content from analysis of organisation's activities 1.3 Analyse business documentation to determine organisational reporting and accountability requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify organisational functions and activities for which records must be kept, from analysis of business and context documentation 1.5 Determine nature, detail, and format of records (content and metadata) for each organisational function and activity from analysis of the business and its context
2. Devise an appropriate recordkeeping system	2.1 Determine metadata needed to store, locate and retrieve records in a business or records system 2.2 Select size of business or records system appropriate to scale and nature of business operations 2.3 Select technological requirements of business or records systems appropriate to scale and nature of business operations 2.4 Select cost structure for business or records systems appropriate to scale, nature, and organisational cash flow requirements 2.5 Ensure maintenance, disposal and updating requirements of business or records system conform to scale, nature, and culture of the organisation 2.6 Select business or records system suited to projected growth of the organisation
3. Develop business rules and procedures to support operations	3.1 Develop rules for incorporating individual records and records capture information into the business or records system 3.2 Develop rules for deciding and recording retention periods and appropriate disposal actions for records 3.3 Develop and document procedures for the use of the system 3.4 Provide system users with training or instructions in the use of the business or records system, appropriate to the culture and scale of the organisation

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

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Reading	1.1-1.5, 2.1, 2.5	• Evaluates and interprets information from a range of relevant sources and identifies relevant and key information
Writing	1.1, 3.1, 3.2, 3.3, 3.4	• Creates documents to convey information and instructions using language and format appropriate to text and audience
Oral Communication	1.1, 3.4	• Uses active listening and questioning techniques to confirm and clarify information • Communicates using words and non-verbal features appropriate to the audience and context
Numeracy	1.1, 1.4, 2.4, 3.2	• Interprets, compares and contrasts numerical data to determine needs • Uses numerical systems associated with record storage systems
Navigate the world of work	1.3, 3.3	• Uses understanding of organisational and legislative requirements in planning an appropriate recordkeeping system
Interact with others	1.1, 3.4	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
Get the work done	1.1-1.5, 2.1-2.6, 3.4	• Sequences and schedules tasks required to achieve outcomes and manages relevant communication • Gathers, analyses and evaluates information to decide on system requirements • Considers purpose, needs and limitations when selecting digital devices and applications • Uses digital systems and tools to complete routine tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG403 Set up a business or records system for a small business	BSBRKG403B Set up a business or records system for a small business	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBRKG403 Set up a business or records system for a small business

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:

- document the steps used to determine the criteria for a business or records system appropriate to the organisation's business functions and reporting requirements
- develop and implement a business or records system including documented rules, procedures, user instructions and training materials.

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 general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
  - environmental context
  - records characteristics
- describe the internal controls required of the business or records system
- outline the characteristics of the organisational functions, structure and culture relevant to the setup of the business or records system
- describe the organisational policies and strategies required by a newly established business or records system
- outline key provisions of relevant legislation that apply to a business or records system.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBRKG404 Monitor and maintain records in an online 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 identify and assess records for storage, and maintain and monitor electronic business records.

It applies to individuals who use guidelines and processes to inform judgements on the status and classification of records in an existing business or records 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

Knowledge Management – Recordkeeping

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. Confirm requirements for recordkeeping in an online environment	1.1 Identify and confirm system procedures for capturing and managing records 1.2 Identify and verify organisational and risk management requirements for classifying and storing online information 1.3 Identify legal, business, financial, socio-historical, and security requirements for recording online business transactions 1.4 Prepare a checklist of organisational requirements to assess

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ELEMENT	PERFORMANCE CRITERIA
	which electronic information should be captured, for how long and in what format
2. Identify and assess records for storage	2.1 Categorise incoming and outgoing records information in terms of key activities and responsible personnel 2.2 Assess information against the organisational checklist and records identified for capture 2.3 Dispose of information not to be stored, in accordance with organisational procedures 2.4 Determine storage methods and media in accordance with retention requirements
3. Monitor and maintain business records in an online environment	3.1 Classify, sentence and link records with other records in the system in accordance with system rules and organisational procedures 3.2 Assign unique identifiers and register records into the recordkeeping system in accordance with system rules and organisational procedures 3.3 Determine access and security status and disposal requirements of records and records in accordance with organisational procedures 3.4 Store records on required media in accordance with organisational and record retention requirements 3.5 Carry out migration of records from one medium to another in accordance with organisational procedures 3.6 Action and record archiving or disposal of records in accordance with disposal schedule and organisational procedures 3.7 Maintain records in a usable and accessible form in accordance with security conditions and 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	Performance Criteria	Description
Reading	1.1, 1.2, 1.3, 2.2,	• Identifies, interprets, analyses and reviews information from a range of complex texts, including legislative

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	2.3, 3.1-3.7	materials and organisational policies and procedures
Writing	1.4, 2.1, 3.1, 3.2, 3.6, 3.7	• Develops list of recordkeeping requirements in required format • Inputs information to create, identify, retrieve or modify records
Oral Communication	1.1, 1.2, 1.3	• Communicates to exchange information with others using questioning and careful listening to clarify requirements
Numeracy	1.1, 1.3	• Interprets and analyses numerically expressed information from records to determine their classification and management requirements
Navigate the world of work	1.2, 1.3, 2.3, 2.4, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7	• Takes personal responsibility for following organisational policies and procedures and legal and regulatory responsibilities relevant to own work context
Get the work done	1.1, 1.2, 1.3, 1.4, 2.4, 3.1, 3.4, 3.5, 3.6, 3.7	• Sequences and schedules tasks required to achieve outcomes according to organisational and legislative requirements • Gathers, analyses and evaluates information to decide on record status • Uses digital systems and tools to access, organise, analyse and display records, showing awareness of the need for data security

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG404 Monitor and maintain records in an online environment	BSBRKG404A Monitor and maintain records in an online 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

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Assessment Requirements for BSBRKG404 Monitor and maintain records in an online 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:

- monitor usage of online business or records system
- monitor application of system procedures
- manage record creation, update, migration and disposal 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 key provisions of relevant legislation that apply to a records system
- explain the general principles and processes of records management and records management systems, including, but not limited to;
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- explain the operation of the online recordkeeping environment including location and nature of transactions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources

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- 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

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BSBRKG502 Manage and monitor business or records 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 set up the operational frameworks for the creation, capture and use of records and to monitor and review these frameworks and activities within a business or records system of a specific business domain.

It 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 recordkeeping environments, such as archives.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Determine requirements or modifications	1.1 Identify and document core business, supporting activities, resources, business and social context, using observation and consultation 1.2 Determine security and access requirements for business or records system content from analysis of organisation's activities 1.3 Analyse organisational reporting and accountability

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ELEMENT	PERFORMANCE CRITERIA
	requirements in the context of the business documentation 1.4 Identify organisational functions and activities for which records must be kept, from analysis of business and context documentation 1.5 Determine format content and metadata of records for each organisational function from analysis of the business and its context
2. Devise an appropriate recordkeeping system	2.1 Determine metadata needed to manage record storage, location and retrieval in a business or records system 2.2 Select scale, and number of business or records systems appropriate to scale and nature of business operations 2.3 Select technological requirements of business or records systems appropriate to scale and nature of business operations 2.4 Select cost structure for business or records systems appropriate to scale, nature, and organisational cash flow requirements 2.5 Ensure maintenance, disposal and updating requirements of business or records system conform to scale, nature, and culture of the organisation 2.6 Select business or records system suited to the projected growth of the organisation
3. Develop an implementation plan	3.1 Identify and document recordkeeping responsibilities of individual personnel or organisational units 3.2 Develop measurable performance indicators for recordkeeping activities 3.3 Develop procedures and guidelines for capturing and controlling records 3.4 Communicate an implementation plan to users of the system and other relevant organisational staff
4. Monitor and review business or records system	4.1 Monitor business and records system and notify staff in accordance with approved timeframes, frequency, and organisational policies and guidelines where applicable 4.2 Record details of variation from business or records system's rules, standards and procedures that exceed agreed limits 4.3 Provide required reports to appropriate authority relating to use and maintenance of records 4.4 Designate responsibilities to staff for record creation and

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ELEMENT	PERFORMANCE CRITERIA
	capture activities in accordance with organisational policies
5. Identify and respond to problems and changes	5.1 Use monitoring reports and external events to identify any problems and changes that require a systemic response 5.2 Make recommendations for revisions to systems, procedures, and strategic plans in response to identified variations, changes and problems 5.3 Devise amendments to systems and implementation or other plans where required 5.4 Prepare recommendations for system amendments, planning and implementation 5.5 Authorise or gain authorisation, for procedures for using the business or records systems, and for any subsequent alterations and amendments to the 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 Criteria	Description
Reading	1.1-1.5, 3.1, 3.2, 4.1, 4.2, 5.1	• Critically evaluates content from a range of structurally complex texts and applies to own context
Writing	1.1, 1.2, 1.5. 2.1, 3.1-3.4, 4.1, 4.2, 4.3, 4.4, 5.2, 5.4, 5.5	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	1.1, 3.1, 3.4, 4.4, 5.5	• Employs active listening and questioning techniques to confirm requirements • Clearly articulates plans and responsibilities to relevant personnel using appropriate language and features
Numeracy	1.1, 1.4, 2.1, 2.4	• Identifies and comprehends numerically expressed information in financial records and other business documentation that informs of recordkeeping system requirements • Assesses need for numerical information in metadata and calculates costs associated with system structure and operation

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Navigate the world of work	3.3, 4.1, 5.1, 5.2	• Develops and maintains organisational policies and procedures, monitors adherence, and understands how own role contributes to broader goals of the work environment
Interact with others	3.4, 4.3, 5.5	• 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, 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 4.4, 5.1, 5.2, 5.3	• Takes responsibility for planning and organising own workload and tasks to ensure work deadlines are met • Makes decisions by using systematic, analytical processes, setting goals, gathering relevant information and identifying and evaluating options against agreed criteria • Understands the purposes, specific functions and key features of digital systems and tools • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG502 Manage and monitor business or records systems	BSBRKG502B Manage and monitor business or records 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

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Assessment Requirements for BSBRKG502 Manage and monitor business or records 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:

- analyse, develop and document a business or records system including a detailed implementation plan
- develop specifications and performance indicators to monitor system effectiveness
- develop and document a plan to address issues identified during monitoring or review.

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 general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- explain the characteristics of the organisational functions, structure and culture relevant to the business or records system
- explain the organisational policies, strategies and procedures for records access and security
- identify problems and changes that could require a systemic response.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG505 Document or reconstruct a business or records 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 document or reconstruct a business or records system and its context.

It applies to individuals who use a range of organisational and analytical techniques to perform their work in archival or general record systems environments. They work closely with other members of an organisation and have individual responsibility for documenting or reconstructing systems.

A business or records system may need to be reconstructed for a variety of reasons, including:

- capturing into archival control systems for access and control purposes
- changes to the system of control including computerisation or migration between systems
- transfer of an organisation's ownership or control arising from amalgamation, takeover or bankruptcy
- administrative change, closure of offices or changes in accommodation.

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

Unit Sector

Knowledge Management – Recordkeeping

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1. Establish activities and functions documented by records	1.1 Identify and document actions, activities and jurisdiction by which records are generated 1.2 Establish boundaries and relationships of activities and functions of records, and check these against a functional analysis of the organisation 1.3 Identify creators of records by mapping them to the parts of the organisation responsible for functions or activities 1.4 Establish and document changes to functions or activities from the records, and verify against other appropriate sources over the time period of the records
2. Analyse the context of records and systems	2.1 Identify and describe previous or subsequent records or series to place records in their context, in accordance with organisational standards 2.2 Identify changes to business or records systems which have occurred over time, including any anomalies to the systemic order of records 2.3 Identify and describe creators of records, including their accountabilities and functional responsibilities 2.4 Identify specific records by nature of their content, similar function, or systemic relationship 2.5 Document and report on the system and records, including identifying any changes and anomalies, in accordance with organisational standards
3. Document reconstruction of the business or records system	3.1 Identify and document elements of the business or records system from records 3.2 Identify and document records series in accordance with organisational standards and procedures 3.3 Establish and maintain control by capturing records in accordance with organisational standards and procedures where system is inadequate or not apparent

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 2.1, 2.2, 3.1, 3.2, 3.3	• Critically organises, evaluates and applies content from a range of structurally complex texts
Writing	1.1, 1.4, 2.3, 2.5, 3.1, 3.2	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	2.3	• Participates effectively in interactions with stakeholders using listening and questioning to obtain required information
Numeracy	2.1, 2.2	• Locates and interprets numerical information in records and the organisation of records systems to identify contextual anomalies
Navigate the world of work	2.1, 2.5, 3.2, 3.3	• Adheres to organisational policies and procedures
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.3	• Takes responsibility for planning and organising tasks and own workload to reconstruct a business or records system • Uses problem-solving and analysis skills to interpret and apply principles of business or records systems according to organisational requirements

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG505 Document or reconstruct a business or records system	BSBRKG505B Document or reconstruct a business or records 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

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Assessment Requirements for BSBRKG505 Document or reconstruct a business or records 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:

- document an analysis of information about records relating to the organisational activities
- apply suitable records series and records systems to the reconstruction of a business records 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:

- explain general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- explain the organisational business functions, structure and culture relevant to the reconstruction of the records system
- explain the organisational policies, strategies and procedures relevant to records access, classification and security.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations

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- 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

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BSBRKG506 Develop and maintain terminology and classification schemes

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 new or modified vocabulary controls and classification schemes for business or records systems based on an organisation's functions and activities.

It applies to individuals who work closely with other staff members throughout an organisation and use a range of investigative, analytical and consultative techniques to perform their work. They may be working in a specialist recordkeeping environment such as archives and their individual responsibilities may include the development and implementation of systems.

Generally, where no formal vocabulary controls exist in an organisation there is a form of controlled titling. This unit covers the formalisation of such informal schemes. Vocabulary control, or controlled language, is commonly called a 'thesaurus' in some sectors of the recordkeeping industry.

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

Unit Sector

Knowledge Management – Recordkeeping

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	**PERFORMANCE CRITERIA**
essential outcomes.	*demonstrate achievement of the element.*
1. Research classification scheme and terminology	1.1 Examine work of an organisation to identify terminology that may reflect business functions and activities 1.2 Review and analyse functional analyses for the basis of terminology and classification schemes 1.3 Review other relevant materials and documents to analyse potential impact on vocabulary controls and classification scheme 1.4 Examine any existing classification schemes and terminology to assess for currency and coverage 1.5 Examine representative samples of records to confirm extent to which an existing classification scheme and terminology have been implemented
2. Develop draft terminology and classification scheme	2.1 Prepare draft vocabulary controls and titling rules 2.2 Ensure draft vocabulary controls reflect organisation's business culture, operational realities and business language 2.3 Identify broad classification groups from a functional analysis 2.4 Analyse and breakdown broad classification groups to the level required for an organisation's use 2.5 Document draft classification scheme
3. Validate draft terminology and classification scheme	3.1 Prepare methodology for the validation process taking local imperatives and environment into consideration 3.2 Conduct consultation with users to identify issues, problems, inconsistencies and any required amendments or additions to draft classification scheme, existing language and vocabulary controls 3.3 Conduct testing and encourage feedback from users to identify any problems and inconsistencies with draft classification scheme and terminology 3.4 Document outcomes throughout the validation process
4. Implement and review terminology and classification scheme	4.1 Prepare classification scheme and terminology from validation and research 4.2 Undertake negotiations with competing interests within the organisation to ensure common understanding and appropriateness of work use and definitions 4.3 Note where existing system requires modification, and prepare specific recommendations in accordance with organisational guidelines

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ELEMENT	PERFORMANCE CRITERIA
	4.4 Prepare final report of revised terminology and classification scheme, in accordance with organisational practice, Australian Standards and international standards 4.5 Seek formal endorsement from appropriate individual or body through submission of final report and classification scheme.

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	1.1-1.5, 2.2, 2.3, 2.4, 4.1, 4.3, 4.4	• Interprets, analyses and reviews a range of texts of relative complexity to construct, confirm and extend understanding
Writing	2.1, 2.4, 2.5, 3.1, 3.2, 3.4, 4.1, 4.2, 4.3, 4.4, 4.5	• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	3.2, 3.3, 4.2, 4.5	• Communicates using appropriate language and non-verbal features • Elicits the view and opinions of others by active listening and questioning
Navigate the world of work	4.3, 4.4	• Uses understanding of organisational policies and procedures and industry standards to inform development of classification scheme
Interact with others	3.2, 3.3, 4.2, 4.5	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience • Collaborates and negotiates with others to achieve joint outcomes, playing an active role in facilitating group interaction
Get the work done	1.1-1.5, 2.2, 2.3, 2.4, 3.1-3.3, 4.1	• Plans and implements tasks required to develop classification scheme • Makes decisions based on systematic analysis of relevant information, identifying and evaluating options against requirements to inform choices • Recognises and addresses some unfamiliar problems

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		of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG506 Develop and maintain terminology and classification schemes	BSBRKG506A Develop and maintain terminology and classification schemes	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

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Assessment Requirements for BSBRKG506 Develop and maintain terminology and classification schemes

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:

- perform a functional analysis to develop a logical, multi-level terminology scheme appropriate to the organisational context
- analyse and classify usage of descriptive terms in detail.

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 general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- briefly describe possible classification schemes
- outline suitable methodologies for validation of classification schemes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBRKG601 Define recordkeeping framework

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 define, identify and establish the recordkeeping framework for an organisation or business unit at functional level.

It applies to individuals who use analytical skills and specialist knowledge of records 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

Knowledge Management – Recordkeeping

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 regulatory and social environment	1.1 Identify and document legal and regulatory framework for the organisation in accordance with industry standards 1.2 Analyse and document relevant legislation for implications for recordkeeping 1.3 Review documentation of organisational functions for compliance 1.4 Analyse broad social context in which the organisation operates to determine community expectations about how it should

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ELEMENT	PERFORMANCE CRITERIA
	conduct itself
2. Determine principal areas of risk requiring recordkeeping strategy	2.1 Review and update organisation's existing risk analyses for implications in relation to redundancy of records 2.2 Review and document regulatory requirements and legal liabilities for their impact on recordkeeping framework 2.3 Determine and document risks and liabilities to be managed by recordkeeping to inform development of the framework
3. Determine record requirements for each business function	3.1 Determine and analyse risks, liabilities and regulatory requirements against each business function 3.2 Communicate and document determined evidence requirements for each business function identifying evidence to be captured as records 3.3 Form the specifications for records from the evidence requirements in accordance with organisational technologies, standards and corporate culture, and in appropriate formats
4. Establish recordkeeping framework for organisation	4.1 Develop and communicate an overview of responsibilities for recordkeeping within the organisation 4.2 Define responsibilities and authorities in relation to regulatory requirements in accordance with industry standards 4.3 Define recordkeeping responsibilities and rights for each business function 4.4 Integrate identified risks and liabilities managed by recordkeeping with the definition of responsibilities for each function 4.5 Define, assign and document levels of accountability and responsibility for each level of recordkeeping 4.6 Communicate documented framework including areas of risk, regulatory requirements, records specifications and responsibilities for recordkeeping review and endorsement, to appropriate persons 4.7 Establish a review process and charge appropriate persons with maintaining the currency of the organisation's recordkeeping framework

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1-1.4, 2.1-2.3, 3.1, 3.2	• Researches, analyses and evaluates information from a range of complex texts against specific requirements to determine organisational needs
Writing	1.1, 1.2, 2.1-2.3, 3.2, 3.3, 4.1-4.6	• 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
Oral Communication	3.2, 4.1, 4.6	• Presents information using language and non-verbal features appropriate to audience • Uses listening and questioning skills to clarify information and confirm understanding
Navigate the world of work	1.1, 2.2, 3.3, 4.2, 4.7	• Understands implications of industry standards, and legislative and regulatory requirements, on recordkeeping requirements and considers these when identifying a recordkeeping framework
Interact with others	3.2, 4.1, 4.6	• Identifies the requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
Get the work done	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.1, 3.3, 4.2, 4.3, 4.4, 4.5, 4.7	• Develops plans to manage complex, non-routine tasks with an awareness of how they contribute to the overall organisation • Makes a range of critical and non-critical decision in relatively complex situations, taking a range of factors into account • Evaluates effectiveness of decisions to identify and implement improvements • Recognises and addresses some unfamiliar problems of increasing complexity within own scope • Understands the uses of digital tools and technologies in the recordkeeping process

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG601 Define recordkeeping framework	BSBRKG601B Define recordkeeping framework	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

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Assessment Requirements for BSBRKG601 Define recordkeeping framework

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:

- analyse information from a range of sources to identify how the recordkeeping framework can address compliance requirements, risks and liabilities arising from:
  - legislation and regulations that apply to the organisation
  - the social context
  - business functions within the organisation
  - identified risks and liabilities
- develop and implement a framework for recordkeeping 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 recordkeeping
- consult and communicate with relevant stakeholders to encourage input to, understanding of and engagement with recordkeeping framework
- establish processes and responsibilities for review of the recordkeeping framework.

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 the key provisions of standards relevant to recordkeeping
- outline the recordkeeping implications arising from the legislative and regulatory context
- describe the general principles and processes of records management and records management systems including:
  - systems of control

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  - records continuum theory
  - mandate and ownership of business process
- explain how organisational business functions, structure and culture relate to the recordkeeping framework
- outline key recordkeeping policies, strategies, functions and structures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG603 Prepare a functional analysis for an 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 analyse the functions, activities and transactions of an organisation or business unit, and to identify and define its boundaries.

It applies to experienced individuals who use specialist knowledge of business areas and operations and apply analytical and problem-solving skills to define organisational arrangements. 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.

Pre-requisite Unit

Knowledge Management – Recordkeeping

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 functions of the organisation at the highest level	1.1 Examine organisational or jurisdictional documentation to establish its principal functions 1.2 Identify programs, projects and supporting activities from reporting documentation, and allocate these to established functions 1.3 Analyse relationship between programs, projects and supporting activities and functions to identify overlap, ambiguities

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ELEMENT	PERFORMANCE CRITERIA
	and omissions 1.4 Document and validate established functions, in accordance with organisational and industry standards
2. Determine component activities and transactions of identified functions	2.1 Review documentation of programs, projects and supporting activities allocated to established functions to develop a statement of all activities performed by the organisation, unit or jurisdiction using appropriate analysis methods 2.2 Obtain information about recurring transactions and actions by consulting agents, and examine organisational and jurisdictional documentation, including records generated by the processes 2.3 Analyse imminent changes to organisation, unit or jurisdiction's business for impact on identified activities 2.4 Document and review determined actions and transactions at activity level in preparation for validation, in accordance with industry standards
3. Build a functional representation of the organisation	3.1 Review and refine assembled documentation of transactions, activities and functions for completeness, accuracy and appropriateness of terminology 3.2 Document combined functional analysis in accordance with industry standards 3.3 Identify activities and functions, showing direct relationships, indirect relationships and anomalies, mapped to organisational structures 3.4 Document findings on relationships between functions and structure to build a functional representation

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, 2.1-2.4, 3.1, 3.3	• Researches and critically analyses complex information from a range of sources • Identifies relationships and processes and extracts and consolidates specific information to determine organisational requirements

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Writing	1.4, 2.1, 2.4, 3.1, 3.2, 3.3, 3.4	• Prepares clear documents for consultation and validation using language, terminology and concepts appropriate for audience • Produces accurate and logically structured reports and presentations using correct organisational formats to ensure clarity of information
Oral Communication	1.4, 2.2	• Participates effectively in consultations with stakeholders using active listening and questioning to obtain feedback and clarify information
Navigate the world of work	1.1, 1.4, 2.2, 2.4, 3.2	• Understands implications of organisational, legislative and industry standards for preparation of a functional analysis
Get the work done	1.2, 1.3, 2.1-2.4, 3.1, 3.3	• Develops and implements 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 decisions in relatively complex situations, taking a range of factors into consideration • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG603 Prepare a functional analysis for an organisation	BSBRKG603B Prepare a functional analysis for an 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

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Assessment Requirements for BSBRKG603 Prepare a functional analysis for an 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:

- research, develop and document a functional representation of the organisation including analysis of the legislative and social framework in which the organisation operates.

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 a range of appropriate analysis methods
- outline the administrative history and regulatory context of the area subject to functional analysis
- describe the key functions and activities of the business area subject to functional analysis
- outline key provisions of relevant legislation, regulations and standards that affect aspects of business operations
- describe the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes

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- relevant workplace documentation and resources
- 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

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BSBRKG604 Determine security and access rules and procedures

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 and establish the rules for access and use of records in an organisation, including classifications and procedures for managing access over time.

It applies to experienced individuals who use specialist knowledge of business and record-keeping operations and apply analytical and problem- solving skills relevant to organisational risk. 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

Knowledge Management – Recordkeeping

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. Analyse access risks, rules and responsibilities	1.1 Establish, analyse and describe the impact of the legal and regulatory framework on access to records for the unit or the entire organisation 1.2 Analyse organisational documentation and information, copies of appraisal reports and access conditions for records of comparable organisations

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Review risk analyses and existing access rules for currency, and determine and document any necessary modifications 1.4 Analyse usage patterns of records taking into account identified risks and existing access rules 1.5 Determine specific restrictions and other responses to regulatory obligations for records and activities 1.6 Determine responsibility for reviewing access decisions from collected organisational documentation and information
2. Develop access strategy, classifications and rules	2.1 Consider factors impacting on access rights in developing an access strategy from collected information, based on established responsibilities for access to records, and in response to identified difficulties and risks 2.2 Determine broad access classifications and reasons for access restrictions from regulatory requirements, identified risks and usage patterns of records within the jurisdiction 2.3 Compile criteria for applying access classifications to records, based on collected information and performed analyses 2.4 Develop rules for applying classifications 2.5 Circulate access classifications and draft rules to users of the business or records system for comment, identifying and analysing exceptions, and modifying classifications where appropriate 2.6 Determine compliance regime and jurisdictional access regime 2.7 Seek authorisation from appropriate body for access classifications and procedures
3. Develop procedures to integrate into business or records system	3.1 Determine access permissions and restrictions for records by applying access rules 3.2 Establish and document categories of users using analyses of access rules and records usage 3.3 Document access permissions and restrictions in relation to categories of users 3.4 Establish mechanisms to control user access applying to records and to users 3.5 Develop and document specifications for recording authorised use of records 3.6 Integrate authorised access procedures into business or records system rules and procedures, and document changes
4. Review and amend	4.1 Develop procedures for reviewing access decisions and for

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ELEMENT	PERFORMANCE CRITERIA
access classifications and rules	responding to exceptions 4.2 Identify a hierarchy of responsibility for reviewing access decisions to comply with jurisdictional access regime 4.3 Communicate changes to access rules and procedures to all users

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	1.1-1.6, 2.1-2.3, 2.6, 3.2, 3.6, 4.2	• Critically analyses documentation from a variety of sources to identify specific criteria and consolidates information to determine requirements
Writing	1.3,2.3-2.5, 2.7, 3.1-3.3, 3.5, 3.6, 4.1, 4.3	• Produces accurate and logically structured documents using grammatical structures, language, terminology and concepts appropriate for audience
Oral Communication	2.5, 2.7, 4.3	• Participates effectively in verbal exchanges using active listening and questioning to obtain feedback and to clarify information
Numeracy	1.4	• Performs mathematical calculations to analyse usage data and to interpret trends
Navigate the world of work	1.1, 1.2, 1.5, 1.6, 2.2, 2.4, 2.6, 3.1, 3.2, 3.6, 4.1, 4.2	• Determines and monitors adherence to organisational policies and procedures • Monitors adherence to legal and regulatory rights and responsibilities
Interact with others	2.5, 2.7, 4.3	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
Get the work done	1.1-1.6, 2.1-2.3, 2.6, 3.1, 3.2, 3.4, 4.1, 4.2	• 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 decisions in relatively complex situations, taking a range of factors and constraints into account

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		• Recognises and addresses some unfamiliar problems of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG604 Determine security and access rules and procedures	BSBRKG604B Determine security and access rules and procedures	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

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Assessment Requirements for BSBRKG604 Determine security and access rules and procedures

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:

- document usage and conduct a risk analysis of policies and procedures for implementing security and access rules
- report on a recordkeeping access strategy, classifications and rules
- document policies and procedures for recordkeeping in an organisation including access permissions, restrictions, and control mechanisms
- report on success of implementation and amendments made in response to monitoring the implementation of the recordkeeping 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 the key provisions of relevant legislation, regulations, standards and documentation that affect recordkeeping systems
- explain general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- explain the reasons for access restrictions
- describe the mechanisms to control user access
- describe key features of organisational policies, strategies and procedures, particularly those relating to sensitive information.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG605 Determine records requirements to document a function

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 the structure, content and context of records to document a business function.

It applies to individuals who use analytical skills and specialist knowledge of records systems and business areas to support operations of a functional area. 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

Knowledge Management – Recordkeeping

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. Locate the function in its organisational and regulatory context	1.1 Identify, review and document regulatory framework for a business function 1.2 Establish and document organisation's accountability requirements for the function 1.3 Establish business processes associated with the function from existing documentation

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ELEMENT	PERFORMANCE CRITERIA
2. Review existing recordkeeping practices for the function	2.1 Review existing records generated by the function to identify essential contents, examine the patterns of use, and identify any new developments in processes or regulatory requirements 2.2 Identify and document risks and liabilities specific to the function from organisation's risk analysis and litigation history 2.3 Consult users who carry out the function and create and use records to identify their assessment of the adequacy of existing records 2.4 Analyse review findings to identify existing and new elements required in the records and document these
3. Document the function's record requirements	3.1 Determine requirements for evidence in relation to the function's performance, accountabilities and risk analysis, and analyse patterns of records usage 3.2 Analyse requirements for evidence to identify all the business transactions of the function that need to be documented in the business or records system 3.3 Document criteria for identifying business transactions and procedures for applying the criteria 3.4 Determine content and structure of the records in all business transactions from the business processes, standards applicable to those processes, and review of existing records 3.5 Specify document structure and metadata for controlling the records of the business transactions, in accordance with external or organisational standards and organisational styles 3.6 Prepare and document procedures for capturing the documents, attaching metadata as required and managing the records to instruct users

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, 3.2, 3.4-3.6	• Critically analyses documentation from a variety of sources to identify specific criteria and consolidates information to determine requirements

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Writing	1.1, 1.2, 2.2-2.4, 3.3, 3.5, 3.6	• Uses language, concepts, formatting and terminology appropriate to organisation and purpose to convey explicit information
Oral Communication	2.3	• Uses clear language and active listening and questioning techniques to obtain and clarify information from record users
Numeracy	2.1, 3.1	• Performs mathematical calculations to analyse usage data and to interpret trends
Navigate the world of work	1.1, 1.3, 2.1, 2.2, 3.3, 3.4, 3.5	• Creates and adheres to organisational policies and procedures • Understands and works within all legislative and regulatory requirements
Interact with others	2.3	• Collaborates with others to achieve joint outcomes,
Get the work done	1.1-1.3, 2.1, 2.2, 2.4, 3.1, 3.2, 3.4, 3.5, 3.6	• 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 decisions in relatively complex situations, taking a range of factors into consideration • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRKG605 Determine records requirements to document a function	BSBRKG605B Determine records requirements to document a function	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

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Assessment Requirements for BSBRKG605 Determine records requirements to document a function

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:

- decide what business function a group of records has and document this information within the context of legislative requirements
- determine if recordkeeping systems are adequate for their purpose based on a review of record usage, risk analysis and function performance
- produce procedures for controlling business records in this environment consistent with standards 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 the key provisions of relevant legislation, regulations, standards and documentation that affect aspects of business operations
- outline the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process.
- describe key features and processes of the functional area.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG606 Design a records retention and disposal schedule

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 retention periods and disposal actions for existing and future records in relation to a business function.

It applies to individuals who use analytical skills and specialist knowledge of records 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

Knowledge Management – Recordkeeping

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. Analyse recordkeeping requirements for the function	1.1 Determine recordkeeping environment and legal, business and societal context for the business function 1.2 Establish and document organisation's accountability requirements for the function 1.3 Analyse existing recordkeeping specifications for the function's records from a range of documentation sources, and consider any relevant developments and their implications 1.4 Review and update risk analysis for the function as required in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational standards, applicable Australian Standards and international standards 1.5 Research and analyse usage patterns of existing records to identify internal and external users, and periods and purposes of use 1.6 Canvass and document user views on their needs and accessibility of the records 1.7 Update and document recordkeeping specifications for the function based on review analysis and survey of user views
2. Determine disposal status of records	2.1 Identify and review the function's business processes from existing functional analyses 2.2 Develop a hierarchical structure based on the functions and establish relevant activities in the functional analysis 2.3 Develop disposal classes according to the boundaries of the transactions and activities which make up the function's processes 2.4 Develop disposal status and retention periods for each disposal class from an analysis of documentation sources for business use, legal requirements, access classifications and review of risk analysis of the function 2.5 Review disposal status and retention periods for each disposal class in relation to the internal and external use of the records, the relationship with other organisational activities, and any other requirements determined from analyses of community expectations 2.6 Describe disposal actions for each disposal class in the relevant documentation
3. Document disposal status and retention periods	3.1 Ensure retention and disposal documentation contain details of business activities, records classes, and required disposal actions 3.2 Identify and assign responsibility for implementing disposal actions for records from retention and disposal documentation 3.3 Submit retention and disposal documentation for approval to appropriate individual or body 3.4 Compile and retain documentation of the analysis and related information for the life of the approved retention and disposal documentation 3.5 Describe disposal class and status, and appropriate disposal actions in the approved retention and disposal documentation

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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	1.1-1.5, 1.7, 2.1, 2.4, 2.5, 3.1, 3.2	• Critically analyses documentation from a variety of sources to identify specific criteria and consolidates information to determine requirements
Writing	1.2, 1.4, 1.6, 1.7, 2.2-2.4, 2.6, 3.1-3.5	• Uses language, concepts, formatting and terminology appropriate to organisation and purpose to convey explicit information
Oral Communication	1.6	• Uses clear language and active listening and questioning techniques to obtain and clarify information from record users
Numeracy	1.5, 2.5	• Performs mathematical calculations to analyse usage data and to interpret patterns and trends • Measures periods of time by performing basic mathematical calculations
Navigate the world of work	1.1, 1.4, 2.4, 2.5	• 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
Interact with others	1.6, 3.3	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience
Get the work done	1.1-1.4, 2.1-2.5, 3.1, 3.2	• 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 decision in relatively complex situations, taking a range of constraints into account • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG606 Design a records retention and disposal schedule	BSBRKG606B Design a records retention and disposal schedule	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

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Assessment Requirements for BSBRKG606 Design a records retention and disposal schedule

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:

- research records created by a specific business function and create a detailed retention and disposal schedule within legislative and organisational parameters
- work closely with record users to determine their needs and access requirements
- submit documentation to the relevant authority for approval.

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 the key provisions of relevant legislation and regulations, standards and other documentation that affect recordkeeping systems
- describe key aspects of relevant organisational, jurisdictional and subsidiary functions, structure, policies, strategies and processes
- outline possible disposal actions and the circumstances in which each could be used
- outline the general principles and processes of records management and records management systems, including:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG607 Document and monitor the record creating context

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 document changes to the particular context or environment in which specific records were or are created, and in which they are used and maintained.

It applies to individuals who use specialist knowledge and research and analytical skills to maintain up to date records and systems for tracking changes to 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

Knowledge Management – Recordkeeping

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. Identify the context of the organisation	1.1 Determine and document the nature of the organisation and its jurisdiction 1.2 Establish regulatory framework specific to the organisation
2. Establish accountability requirements for creators	2.1 Identify creators of records by establishing all parts of the organisation which create records

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ELEMENT	PERFORMANCE CRITERIA
of records	2.2 Determine and document accountability requirements and functional responsibilities of the creators of records 2.3 Verify and document authentic sources used in the research, in accordance with organisational and external standards
3. Identify contextual changes over time	3.1 Map the functions generating the records and the regulatory framework governing them, to the organisational structures 3.2 Identify and document changes to the administrative and functional context over time
4. Monitor changes to organisational structures, functions and responsibilities	4.1 Monitor changes which impact on organisational structures 4.2 Review and update documentation in light of identified changes

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, 2.2, 2.3, 3.1, 3.2, 4.2	• Critically analyses, extracts and consolidates complex information to determine organisational requirements from a range of sources
Writing	1.1, 2.2, 2.3, 3.1, 3.2, 4.2	• Produces accurate and logically structured documentation using grammatical structures, language, terminology and concepts appropriate for audience
Navigate the world of work	1.2, 2.3, 3.1	• Monitors adherence to relevant organisational policies, legislative and regulatory requirements • Considers own role in terms of its contribution to broader goals of the work environment
Get the work done	1.1, 2.1, 2.2, 3.1, 3.2, 4.1	• 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 factors into account • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG607 Document and monitor the record creating context	BSBRKG607B Document and monitor the record creating context	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

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Assessment Requirements for BSBRKG607 Document and monitor the record creating context

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:

- document an analysis of the organisation's record creating context and the implications of changes to the record creating context.

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:

- summarise the administrative history and regulatory context of the area subject to functional analysis
- describe the business in which area subject to functional analysis is engaged
- outline the key provisions of relevant legislation and regulations, standards and other documentation that affects recordkeeping systems
- outline the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- describe key organisational policies, strategies and procedures, particularly those relating to records access and security.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRKG608 Plan management of records over time

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 the breadth and depth of a collection of records and to develop strategic and implementation plans for the management of records over time.

It applies to individuals who use specialist knowledge, analytical skills and problem-solving techniques 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

Knowledge Management – Recordkeeping

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. Determine policies and strategies for management of records over time	1.1 Develop strategies to manage storage and access records, in accordance with industry standards and taking into account available resources 1.2 Develop strategies in the context of organisational culture, including migration and preservation strategies 1.3 Determine boundaries of the collection from identified recordkeeping requirements for the jurisdiction

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Determine records storage and usage requirements from available documentation and observe organisational behaviour to enable monitoring against the strategic plan 1.5 Identify other parties who create or use records which require storage and factor these into estimates 1.6 Develop a vital records strategy that includes the criteria for vital records and the allocation of responsibility in case of a disaster 1.7 Incorporate vital records strategy into the wider organisational disaster management strategy after approval by appropriate authority
2. Develop strategy and implementation plan for managing records over time	2.1 Review existing internal and external documents which may impact on the transfer of custody and responsibility for records 2.2 Confirm that recordkeeping jurisdictions of the organisation include boundaries of accountabilities from documentation relevant to the transfer of ownership or custody of records 2.3 Specify and document requirements for the transfer of custody, ownership and responsibility 2.4 Specify nature of agreements with receiving bodies or individuals, including rules for negotiation, minimum requirements of legal custody, and signatories to the agreements 2.5 Clearly and logically document rules for the transfer of custody, ownership, and responsibility of records in accordance with organisational requirements
3. Manage preservation of records over time	3.1 Develop records collection strategies and policies which reflect the collecting institution’s strategies and directions, and potential changes in operating environments 3.2 Ensure collections strategies reflect evaluation of collection use and availability of alternative formats for resource sharing and in-house collection, as well as access to records from remote sources 3.3 Determine boundaries for the collection, and negotiate commonalities or overlaps of jurisdiction and common boundaries between collecting institutions 3.4 Manage selection, acquisition and disposal of collection material to make best use of staff knowledge, expertise and resources 3.5 Establish processes for the receipt of donations and bequests under legal deposits, policy or other directives, and review the collection taking into account collection strategies, policies and

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ELEMENT	PERFORMANCE CRITERIA
	disposal 3.6 Initiate and respond to cooperative collection projects where mutual benefits can be gained

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, 2.2,	• Analyses and evaluates complex textual information to identify organisational practices, and to discern the values of information, documents and manuscripts
Writing	1.1-1.7, 2.3-2.5, 3.1, 3.3, 3.6	• Prepares and compiles logically structured documents and reports using organisational formats to convey clear information about complex relationships and processes
Oral Communication	3.3, 3.6	• Uses collaborative techniques to consult and negotiate requirements with a range of internal and external stakeholders • Uses clear language, terminology and concepts relevant to audience and purpose
Numeracy	1.1, 1.4, 1.5, 3.4	• Performs calculations and uses mathematical problem-solving techniques to estimate and analyse data relating to cost, quantity, volume and time.
Navigate the work of work	1.1-1.3, 2.4, 2.5, 3.5	• Uses understanding of organisational and legislative and regulatory requirements to develop strategies to manage records • Understands how own role contributes to broader goals of the work environment
Get the work done	1.1-1.4, 1.6, 1.7, 2.1, 3.1-3.6	• 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 decisions in relatively complex situations, taking into account a range of constraints • Recognises and addresses some unfamiliar problems of increasing complexity within own scope

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		• Supports new ideas on the basis of their contribution to the achievement of broader goals

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG608 Plan management of records over time	BSBRKG608B Plan management of records over time	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

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Assessment Requirements for BSBRKG608 Plan management of records over time

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 records management policies, procedures and strategies
- document a recordkeeping plan
- develop strategies that ensure records are preserved.

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 the key provisions of legislation, regulations, standards and documentation that affect management of records
- outline the general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- describe key organisational policies, strategies and procedures, particularly those relating to records access and security
- outline recordkeeping policies, strategies, functions and structures in the jurisdiction
- discuss social and cultural trends which impact on how records are kept.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRSK401 Identify risk and apply risk management processes

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 risks and to apply established risk management processes to a defined area of operations that are within the responsibilities and obligations of the role.

It 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 to delegate aspects of these tasks to others.

In this unit, risks applicable within 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

Regulation, Licensing and Risk – Risk Management

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. Identify risks	1.1 Identify the context for risk management 1.2 Identify risks using tools, ensuring all reasonable steps have

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ELEMENT	PERFORMANCE CRITERIA
	been taken to identify all risks 1.3 Document identified risks in accordance with relevant policies, procedures, legislation and standards
2. Analyse and evaluate risks	2.1 Analyse and document risks in consultation with relevant stakeholders 2.2 Undertake risk categorisation and determine level of risk 2.3 Document analysis processes and outcomes
3. Treat risks	3.1 Determine appropriate control measures for risks and assess for strengths and weaknesses 3.2 Identify control measures for all risks 3.3 Refer risks relevant to whole of organisation or having an impact beyond own work responsibilities and area of operation to others as per established policies and procedures 3.4 Choose and implement control measures for own area of operation and/or responsibilities 3.5 Prepare and implement treatment plans
4. Monitor and review effectiveness of risk treatment/s	4.1 Regularly review implemented treatment/s against measures of success 4.2 Use review results to improve the treatment of risks 4.3 Provide assistance to auditing risk in own area of operation 4.4 Monitor and review management of risk in own 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	Performance Criteria	Description
Reading	1.2	• Comprehends documents and texts of varying complexity to extract and analyse relevant information
Writing	1.3, 2.1, 2.3, 3.5	• Uses specific, industry related terminology and logical organisational structure in workplace documents that identify and analyse risk and report management process outcomes

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Oral communication	2.1	• Participates effectively in interactions with stakeholders by using questioning and listening to elicit opinions and clarify understanding
Numeracy	1.2, 4.1	• Uses numerical tools to assess risk and uses numerical data to review plans
Navigate the world of work	1.1, 1.3, 3.3	• 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
Interact with others	2.1	• Selects appropriate communication protocols and conventions when conferring with others to establish risk management requirements
Get the work done	1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 3.4, 3.5, 4.1, 4.2, 4.3, 4.4	• Determines job sequence and works logically and systematically to undertake defined tasks • 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 • Uses familiar digital technologies and systems to access information, prepare plans and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRSK401 Identify risk and apply risk management processes	BSBRSK401A Identify risk and apply risk management processes	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

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Assessment Requirements for BSBRSK401 Identify risk and apply risk management processes

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 organisational policies, procedures and processes to:

- identify risks
- consult with relevant stakeholders to analyse and evaluate risks
- identify and evaluate control measures
- develop and implement treatment plans for own area or responsibility
- refer risks that are beyond own area of responsibility to others
- maintain risk management 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:

- outline techniques for identifying and evaluating risks
- outline organisational policies, procedures or processes for risk management
- give examples of areas where risks are commonly identified in an organisation
- outline the purpose and key elements of current risk management standards
- outline the legislative and regulatory context of the organisation in relation to risk management
- describe the organisation's auditing requirements relating to risk management.

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 - risk management field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBRSK501 Manage risk

Modification History

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

Application

This unit describes skills and knowledge required to manage risks in a range of contexts across an organisation or for a specific business unit or area in any industry setting.

It applies to individuals who are working in positions of authority and 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

Regulation, Licensing and Risk – Risk Management

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 risk context	1.1 Review organisational processes, procedures and requirements for undertaking risk management in accordance with current risk management standards 1.2 Determine scope for risk management process 1.3 Identify internal and external stakeholders and their issues 1.4 Review political, economic, social, legal, technological and policy context

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Review strengths and weaknesses of existing arrangements 1.6 Document critical success factors, goals or objectives for area included in scope 1.7 Obtain support for risk management activities 1.8 Communicate with relevant parties about the risk management process and invite participation
2. Identify risks	2.1 Invite relevant parties to assist in the identification of risks 2.2 Research risks that may apply to scope 2.3 Use tools and techniques to generate a list of risks that apply to the scope, in consultation with relevant parties
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 most appropriate options for treating risks 4.2 Develop an action plan for implementing risk treatment 4.3 Communicate risk management processes to relevant parties 4.4 Ensure all documentation is in order and appropriately stored 4.5 Implement and monitor action plan 4.6 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	Performance Criteria	Description
Reading	1.1, 1.4, 1.5, 2.2	• Comprehends a variety of relatively complex texts • Gathers, interprets and analyses textual information from a range of sources to identify relevant information
Writing	1.6, 1.8, 2.1, 2.3, 4.3	• Develops textual material and organises content in a manner that effectively documents

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		risk management analysis and assessment priorities and processes
Oral Communication	1.8, 2.1, 2.3, 4.3	• Participates in interactions with stakeholders using questioning and listening to elicit opinions, and to confirm and clarify understanding
Numeracy	2.2	• Uses numerical tools to assess risk and uses numerical data to review plans
Navigate the world of work	1.1, 2.1, 4.3	• Refers to organisational processes, procedures and requirements when making decisions about risk management
Interact with others	1.8, 2.1, 2.3, 4.3	• Establishes and uses appropriate conventions and protocols when communicating with stakeholders about risk management • Consults and negotiates with stakeholders about risk management processes and outcomes
Get the work done	1.2, 1.3, 1.5, 1.7, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 4.1, 4.2, 4.4, 4.5, 4.6	• 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 • Uses digital technologies and systems to access information, document plans and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRSK501 Manage risk	BSBRSK501B Manage risk	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

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Assessment Requirements for BSBRSK501 Manage risk

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:

- 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 relevant 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.

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 the purpose and key elements of current risk management standards
- outline the legislative and regulatory context of the organisation in relation to risk management
- outline organisational policies, procedures and processes for risk management.

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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 - risk management field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBSLS407 Identify and plan sales prospects

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 potential sales prospects by applying prospecting methods, and manage own sales performance by establishing a sales plan, while managing stress, time and sales-related paperwork.

It applies to individuals working in a sales-related position in a small, medium or large enterprise in a wide variety of industries, who identify, collate and follow up sales prospect information to generate leads. Individuals undertaking this unit may be at entry level, or have experience in sales sufficient to provide advice and support about aspects of sales solutions as part of a sales team.

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

Unit Sector

Business Development – Sales

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. Employ prospecting methods and qualify prospects	1.1 Identify, consider and evaluate strengths and limitations of range of primary and secondary prospecting methods 1.2 Select prospecting methods to match market to which the product or service is targeted 1.3 Target present, previous and new clients through chosen

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ELEMENT	PERFORMANCE CRITERIA
	prospecting methods 1.4 Research and establish criteria for qualifying leads according to buyer accessibility, buyer motives, product affordability, purchase authority, legal compliance and return for seller 1.5 Ensure established criteria represent a standard against which buying potential of individuals and groups is gauged
2. Manage prospect information	2.1 Develop and implement system for recording prospect information 2.2 Monitor and evaluate effectiveness of system for recording prospect information 2.3 Refine system for recording prospect information based on evaluation
3. Establish individualised sales plan	3.1 Establish individual sales goals and quotas to focus work activities, based on organisational sales and marketing objectives 3.2 Establish consultation and communication structures with clients and supervisors 3.3 Plan and document individualised sales plan to achieve sales goals and quotas within a work system constructed against clear timeframes 3.4 Monitor and adjust sales plan to established goals and quotas 3.5 Evaluate sales plan and adjust where necessary
4. Complete sales paperwork and reports	4.1 Establish system to collect, record and organise data associated with sales process 4.2 Complete routine reports at regular intervals according to organisational requirements 4.3 Use available technology to facilitate record-keeping and production of sales reports
5. Organise workload effectively	5.1 Establish routines to provide structure for work and to manage workload 5.2 Allocate time for specific work tasks and unanticipated events and activities 5.3 Conduct analysis of time spent on work-related activities and adjust time spent on tasks, if required 5.4 Apply time-management strategies to minimise non-productive sales activities 5.5 Delegate tasks to individuals or sales team members to share

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ELEMENT	PERFORMANCE CRITERIA
	workload as appropriate 5.6 Identify and monitor symptoms of stress and seek expert assistance

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	1.1-1.5, 2.1-2.3, 3.1-3.5, 4.1-4.3, 5.1-5.4	• Analyses and evaluates textual information to develop research strategies, integrate facts and ideas and meet organisational requirements
Writing	1.1-1.5, 2.1-2.3, 3.1-3.5, 4.1-4.3, 5.1-5.4	• Creates documents using specific and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.3, 5.2, 5.5	• Presents information using clear language suited to the audience • Uses listening and questioning skills to check and confirm understanding
Numeracy	1.4-1.5, 3.1, 3.3-3.5, 5.2-5.4	• Applies ratios and percentages and relevant formulae to data to calculate and interpret time durations and establish financial goals
Navigate the world of work	1.4, 3.1, 3.4, 4.2	• Follows explicit and implicit organisational objectives, protocols and legal requirements
Interact with others	1.3, 3.2, 5.5, 5.6	• Tailors communication to achieve purpose, demonstrating a sophisticated understanding of audience needs • Collaborates with others to achieve organisational objectives
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 3.3-3.5, 4.1-4.3, 5.1, 5.3-5.6	• Sequences and schedules complex activities of self and others and monitors implementation • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and evaluating options against agreed criteria • Monitor implementation of solutions and reflects on outcomes to identify appropriate action

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		• Develops new and innovative ideas through exploration, analysis and critical thinking • Uses 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
BSBSLS407 Identify and plan sales prospects	BSBSLS407A Identify and plan sales prospects	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

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Assessment Requirements for BSBSLS407 Identify and plan sales prospects

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:

- evaluate and select the use and management of different sales prospecting methods
- develop, monitor and refine a system for recording prospecting methods
- plan, document and monitor individualised sales plan
- establish data collection system
- use appropriate technology
- organise, analyse and delegate workloads to maximise productivity
- identify and monitor symptoms of stress.

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 information management strategies used to manage prospect and sales data
- identify key principles associated with self-management
- outline key provisions of relevant legislation, codes of practice and national standards related to the sales environment
- describe prospecting methods used in sales process
- identify principles of buyer motives
- describe strategies and techniques used to prevent and manage stress.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – sales field of work and include access to:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBSLS408 Present, secure and support sales solutions

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 present sales solutions that respond to specific buying needs of a client, and to use sales processes associated with securing prospect commitment to proceed with a sale.

It also includes attending to post-sales activities that build and strengthen the partnership between a salesperson and client, and enhance the likelihood of future sales.

It applies to individuals working in sales-related positions in a small, medium or large enterprise, in a wide variety of industries, who may provide sales solutions individually, or provide advice and support on aspects of sales solutions to support a sales team.

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

Unit Sector

Business Development – Sales

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. Prepare for sales presentation	1.1 Obtain and organise products, ideas and services for use within sales presentation 1.2 Review product information to ensure familiarity with products

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify sales tactics, and assess and choose options that meet needs and preferences of the prospect 1.4 Consider variety of sales solutions and prepare to meet buyer needs 1.5 Identify and select sales aids 1.6 Identify alternatives for prospects and assess in relation to anticipated buyer needs
2. Present sales solution	2.1 Use gestures, posture, body language, facial expressions and voice to create a supportive selling environment 2.2 Use listening skills and open-ended questions to identify buyer needs, preferences, motives and objections 2.3 Adjust presentation to match needs and preferences of buyer 2.4 Use persuasive communication techniques to secure buyer interest 2.5 Ensure presentation demonstrates and communicates key features of product and emphasises benefits in relation to identified buyer needs 2.6 Obtain and present proof of benefits through product purchase 2.7 Use sales aids to build buyer understanding of how product aligns with needs
3. Respond to buyer signals	3.1 Identify and assess verbal and non-verbal buying signals 3.2 Use probing to identify source of buyer resistance 3.3 Identify strengths and limitations of buyer resistance strategies 3.4 Select and implement strategy for managing buyer resistance 3.5 Use trial closes strategically during different stages of sales process
4. Negotiate and finalise sale	4.1 Initiate formal close to sales process following one or more trial closes 4.2 Select strategy to close sale, and use supportive and confirming language to support closure 4.3 Negotiate conditions of agreement, outline a summary of agreement to buyer, and confirm buyer's decision 4.4 Provide advice on financing arrangements, if required 4.5 Prepare and complete sales documents, and process and monitor client order

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ELEMENT	PERFORMANCE CRITERIA
	4.6 Identify and present cross-selling opportunities to buyer
5. Support post-sale activities	5.1 Ensure contact is made with buyer post-sale to ensure agreed expectations have been met 5.2 Provide technical assistance or advice and assist clients to access appropriate after-sales support 5.3 Use feedback solicitation regarding sales process and product satisfaction 5.4 Address and resolve service problems and difficulties identified through feedback 5.5 Develop and implement client loyalty strategies to secure buyer loyalty and facilitate ongoing contact 5.6 Offer and implement additional sales solutions and benefits to clients when opportunities arise

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	1.1-1.6, 2.7, 4.3-4.6, 5.1-5.6	• Analyses and evaluates textual information to develop research strategies, integrate facts and ideas, and meet organisational requirements
Writing	1.1, 4.5-4.6, 5.1-5.6	• Creates documents using specific and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.1, 2.1-2.7, 3.1-3.5, 4.1-4.6, 5.1-5.6	• Obtains information by listening and questioning, and • Participates in discussions using detailed, clear and persuasive language to contribute details, express requirements and provide advice
Numeracy	2.6, 4.3-4.5, 5.5	• Identifies, interprets and compares mathematical information in simple and familiar written texts
Interact with others	2.3, 2.4, 3.2-3.4, 4.2, 5.3-5.5	• Uses a range of interpersonal skills to build rapport and establish relationships with others • Tailors communication to achieve purpose, demonstrating a sophisticated understanding of audience needs

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Get the work done	1.1-1.3, 2.1-2.7, 3.2, 3.4, 3.5, 4.1-4.6, 5.1-5.6	• Sequences and schedules complex activities to achieve outcomes in a timely fashion • Uses systematic, analytical processes in complex, non-routine situations, setting goals, designing strategies, gathering relevant information and evaluating options • Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes • Uses 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**
BSBSLS408 Present, secure and support sales solutions	BSBSLS408A Present, secure and support sales solutions	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

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Assessment Requirements for BSBSLS408 Present, secure and support sales solutions

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 principles of effective sales presentation
- identify buyer needs and present sales solution
- manage buyer resistance
- finalise a sale
- implement support for post-sale 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:

- demonstrate detailed product knowledge, including product:
  - advantages and disadvantages
  - features
  - service benefits
- identify materials and aids that support presentations
- identify principles for achieving an effective sales presentation mix
- describe statistical methods used to demonstrate sales performance
- describe strategies used to:
  - manage client accounts
  - build client goodwill
  - develop client loyalty.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – sales field of work and include access to:

- office equipment and resources
- support materials for effective presentations
- 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

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BSBSLS501 Develop a sales plan

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 a sales plan for a product or service for a team covering a specified sales territory based on strategic objectives and in accordance with established performance targets.

It applies to individuals working in a supervisory or managerial sales role who develop a sales plan for a product or service.

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

Unit Sector

Business Development – Sales

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. Identify organisational strategic direction	1.1 Obtain and analyse assessment of market needs and strategic planning documents 1.2 Review previous sales performance and successful approaches to identify factors affecting performance 1.3 Analyse information on market needs, new opportunities, customer profiles and requirements as a basis for decision making
2. Establish performance	2.1 Determine practical and achievable sales targets

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ELEMENT	PERFORMANCE CRITERIA
targets	2.2 Establish realistic time lines for achieving targets 2.3 Determine measures to allow for monitoring of performance 2.4 Ensure objectives of the sales plan and style of the campaign are consistent with organisational strategic objectives and corporate image
3. Develop a sales plan for a product	3.1 Determine approaches to be used to meet sales objectives 3.2 Identify additional expertise requirements and allocate budgetary resources accordingly 3.3 Identify risks and develop risk controls 3.4 Develop advertising and promotional strategy for product 3.5 Identify appropriate distribution channels for product 3.6 Prepare a budget for the sales plan 3.7 Present documented sales plan to appropriate personnel for approval
4. Identify support requirements	4.1 Identify and acquire staff resources to implement sales plan 4.2 Develop an appropriate selling approach 4.3 Train staff in the selling approach selected 4.4 Develop and assess staff knowledge of product to be sold
5. Monitor and review sales plan	5.1 Monitor implementation of the sales plan 5.2 Record data measuring performance versus sales targets 5.3 Make adjustments to sales plan as required to ensure required results are obtained

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, 2.4, 3.5, 4.1, 5.1-5.3	• Analyses and interprets workplace documentation • Recognises information in job specifications and work processes related to sales requirements

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Writing	1.2, 2.1-2.3, 3.1-3.6, 4.2, 4.3, 5.1- 5.3	• Accurately records information according to organisational requirements • Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose
Oral Communication	3.7, 4.1, 4.3, 4.4	• Presents information to a range of audiences using appropriate structure and language • Uses questioning and active listening to request feedback or to clarify or confirm understanding
Numeracy	1.1-1.3, 2.1-2.3, 3.2, 3.6, 5.2-5.3	• Uses a wide range of mathematical calculations to enter or analyse information related to sales plans, targets and performance
Navigate the world of work	1.1, 2.4	• Considers organisational goals when determining and developing sales plans and strategies
Interact with others	3.7, 4.1, 4.3, 4.4	• Identifies and uses appropriate conventions and protocols when communicating with a range of personnel • Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve training goals
Get the work done	1.1, 1.3, 2.1-2.3, 3.2-3.7, 4.1, 4.2, 4.4, 5.1, 5.3	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses systematic, analytical processes in complex, non-routine situations, setting goals, designing strategies, gathering relevant information and evaluating options • Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes • Develops new and innovative ideas through exploration, analysis and critical thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSLS501 Develop a sales plan	BSBSLS501A Develop a sales plan	Updated to meet Standards for Training Packages Minor edits to clarify the intent of	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		Performance Criteria	

Links

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

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Assessment Requirements for BSBSLS501 Develop a sales plan

Modification History

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

Performance Evidence

Evidence of the ability to:

- analyse information from a range of sources to develop a sales plan for a product and sales territory that meets organisational strategic direction including:
  - resource requirements and budget
  - achievable sales targets
  - performance measures
  - approaches to be used to meet objectives
  - risk management
  - advertising and promotional strategy
  - product distribution channels
- acquire staff, develop selling approach and provide training support on product knowledge and sales approach
- monitor and evaluate performance and adjust the plan as appropriate.

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 principles and techniques for selling
- outline methods for monitoring sales outcomes
- explain the statistical techniques for analysing sales and market trends
- outline internal and external sources of information that are relevant to identifying organisational strategic direction and developing a product sales plan.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – sales field of work and include access to:

- relevant workplace documentation and resources
- 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

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BSBSLS502 Lead and manage a sales team

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, implement, direct and evaluate sales team activities.

It applies to individuals working in a supervisory or managerial sales role who provide leadership to a sales team to increase the effectiveness of their performance.

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

Unit Sector

Business Development – Sales

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. Plan sales operations	1.1 Set sales teams objectives 1.2 Prepare sales plan and budget to support attainment of objectives 1.3 Develop objectives related to the nature of the sales operation which are consistent with marketing and sales strategies 1.4 Determine the size and structure of the sales team 1.5 Recruit, select and induct sales team members on an ongoing basis in accordance with job analysis and sales team objectives 1.6 Provide sales team members with initial training using

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ELEMENT	PERFORMANCE CRITERIA
	appropriate training methods 1.7 Establish sales team compensation methods and levels 1.8 Establish sales territories, sales targets and performance standards
2. Direct sales team	2.1 Implement strategies to encourage, motivate and support sales team members 2.2 Coach or mentor sales team members to facilitate attainment of sales targets 2.3 Model client-focused tactics for sales team members 2.4 Allocate resources in accordance with organisational policies and procedures to support attainment of sales targets 2.5 Analyse sales volume, conversion rate data and cross-selling ratios to monitor sales performance 2.6 Monitor the ethical and social conduct of the sales team in accordance with legal requirements, professional expectations and organisational policy
3. Evaluate sales team performance	3.1 Establish systems to evaluate sales effectiveness against performance standards 3.2 Offer sales team members constructive feedback on their performance 3.3 Recognise and reward superior sales team member performance 3.4 Take corrective action where sub-standard sales team member performance is identified 3.5 Adjust sales team planning in light of evaluation processes

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	1.2-1.8, 2.1, 2.4-2.6, 3.1, 3.4, 3.5	• Analyses and interprets workplace documentation • Recognises information related to sales requirements within job specifications and work processes

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Writing	1.1-1.8, 2.1, 2.4-2.6, 3.1, 3.4, 3.5	• Accurately records information according to organisational requirements • Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose
Oral Communication	1.1, 1.5, 1.6, 2.1, 2.2, 3.2, 3.4	• Articulates issues and requirements clearly and obtains information from others by listening and questioning
Numeracy	1.1, 1.2, 1.7, 1.8, 2.4, 2.5, 3.1, 3.4, 3.5	• Uses a wide range of mathematical calculations to enter or analyse information related to sales plans, targets and performance
Navigate the world of work	1.3, 2.4, 2.6, 3.1	• Considers broader organisational goals when developing team objectives • Models behaviours that are an example for others and that are consistent with organisation protocols, policies, procedures and strategies • Monitors conduct of self and others to ensure compliance with legal requirements, professional standards and organisational policy
Interact with others	1.5, 1.6, 2.2, 2.3, 3.2, 3.3, 3.4	• Plays a lead role in situations requiring effective collaboration, demonstrating high level influencing skills whilst engaging and motivating others • Uses interpersonal skills to gain trust and confidence of colleagues and provides feedback to others in forms that they can understand and use • Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve training goals
Get the work done	1.1, 1.3-1.8, 2.1-2.6, 3.1-3.5	• Sequences and schedules complex activities of self and others and manages relevant communication • Uses systematic, analytical processes in complex, non-routine situations, setting goals, designing strategies, gathering relevant information and evaluating options to inform decision making • Uses formal and informal processes to monitor implementation of solutions, to reflect on outcomes and then take appropriate action when required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSLS502 Lead and manage a sales team	BSBSLS502A Lead and manage a sales team	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

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Assessment Requirements for BSBSLS502 Lead and manage a sales team

Modification History

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

Performance Evidence

Evidence of the ability to:

- plan sales operations and resources required to attain sales objectives including:
  - structure and size of sales team
  - compensation methods and levels
  - sales territories
  - targets and performance standards
- recruit and induct personnel and provide support including :
  - training, coaching and mentoring
  - strategies for motivation, encouragement, recognition and reward
  - modelling client-focused sales tactics
  - providing constructive feedback
- establish team work structures, targets and performance standards
- allocate resources in accordance with organisational policies and procedures to support attainment of sales targets
- establish systems to monitor and evaluate performance including:
  - sales volume, conversion rate data and cross-selling ratios
  - legal, ethical and social conduct
- analyse performance data and take corrective action or adjust sales plans as appropriate.

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 organisation’s procedures that relate to budgets and resource allocation

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- explain the relevance of sales volume, conversion rate data and cross-selling ratios
- outline human resource management strategies
- outline the legislative and regulatory context of the organisation in relation to management of a sales team
- explain challenges in structuring a sales team and managing sales territories and possible strategies to address them.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the business development – sales field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBSMB201 Identify suitability for micro business

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 self-evaluation to determine whether identified business opportunities are realistic.

It applies to individuals who critically examine potential business ideas by identifying gaps in the marketplace.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Explore potential business ideas	1.1 Identify products and services available from local micro and small businesses 1.2 Identify products and services not available locally 1.3 Determine opportunities for new micro businesses based on gaps in available goods and services 1.4 Identify and utilise a range of sources to gather information about micro business opportunities identified 1.5 Outline processes to be undertaken by the micro business to

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ELEMENT	PERFORMANCE CRITERIA
	provide products/services
2. Compare personal skills and aspirations with micro business opportunities	2.1 Identify personal reasons for entering into a micro business in realistic terms of own personal commitments, expectations and capabilities 2.2 Match personal capabilities realistically with identified business opportunities 2.3 Examine personal commitments, expectations and capabilities to realistically identify impact on preferred business opportunity 2.4 Examine options to address and minimise negative impact and strengthen positive impact of these aspects
3. Access business learning opportunities, mentoring and advice	3.1 List skills and knowledge required to develop and operate, to maximise the business opportunity 3.2 Identify and interpret business information and terminology 3.3 Identify gaps in personal skills and knowledge needed for the business 3.4 Identify appropriate learning opportunities to rectify gaps in personal skills and knowledge 3.5 Identify potential mentors, advisers, networks and sources of assistance for the business

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	2.4, 3.3-3.5	• Analyses skills gaps and development needs to identify professional learning needs • Identifies appropriate development opportunities to achieve learning goals
Reading	1.1, 1.4, 3.2	• Interprets textual and numerical information to determine business requirements
Writing	3.1	• Uses clear and relevant language to convey personal information, requirements and recommendations
Oral	1.4, 3.5	• Articulates clearly and confidently using specific and relevant language suitable to audience

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Communication		
Numeracy	3.2	• Extracts, evaluates and compares numerical information
Navigate the world of work	2.1, 2.2, 2.4	• Regularly reviews current situation and future business options, developing strategies to address some factors that may limit choices
Interact with others	1.4, 3.5	• Establishes rapport and builds relationships with people who can assist with new business opportunities
Get the work done	1.1-1.4, 2.2, 2.3	• Selects or supports new ideas on basis of their contribution to achievement of broader goals • Makes final decisions using clear priorities and criteria • May operate from a broad conceptual plan, developing operational detail in stages, regularly reviewing priorities and performance during implementation

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB201 Identify suitability for micro business	BSBSMB201A Identify suitability for micro business	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

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Assessment Requirements for BSBSMB201 Identify suitability for micro business

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 and determine micro business opportunities by locating existing market gaps
- demonstrate effective matching of personal attributes with micro business opportunities, and identification of personnel and skill development opportunities
- collaborate with others to identify mentors, advisors and networks to assist micro businesses.

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:

- list the four main business structures used by businesses in Australia
- choose one structure and outline the tax requirements
- explain business benchmarking
- explain differences between micro business and large corporations
- detail training courses available to micro business operators
- locate and summarise functions of the Fair Work Ombudsman (FWO) and the Fair Work Commission.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes

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- relevant workplace documentation
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirement.

Links

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BSBSMB301 Investigate micro business 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 consider the major elements of a business idea, undertake research to determine viability of the business opportunity and present the idea with reference to the legislative frameworks affecting the business.

It applies to individuals who are establishing or operating a micro business for self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Describe business ideas	1.1 Gather information for business ideas from appropriate sources 1.2 List details of business ideas and opportunities 1.3 Research alternative business ideas in light of available resources 1.4 Specify and list products and services to match business ideas 1.5 Identify and research potential customer information for business ideas

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Identify and take into account available financial, business and technical skills when researching business opportunities
2. Identify market needs	2.1 Collect information regarding market size and potential from appropriate sources 2.2 Investigate market trends and developments to identify market needs relative to business ideas 2.3 Gather market information from primary and secondary sources to identify possible market needs in relation to business ideas 2.4 Identify ethical and cultural requirements of the market, and their relevance for business ideas 2.5 Identify new and emerging markets and document their features 2.6 Identify and organise information on expected market growth or decline and associated risk factors
3. Investigate factors affecting the market	3.1 Identify projected changes in population, economic activity and labour force that may impact business ideas 3.2 Identify movements in prices, and projected changes in availability of resources 3.3 Review trends and developments and identify their potential impact on business ideas

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, 2.1-2.6, 3.1-3.3	• Analyses and evaluates textual information to develop research strategies, integrate facts and ideas and meet business requirements
Writing	1.1, 1.2, 1.4, 1.5, 2.3, 2.5	• Uses factual information and industry related terminology to complete required documentation
Oral Communication	1.1, 1.5, 2.3, 2.5	• Clearly articulates requests using specific and relevant language, and uses listening and questioning

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		techniques to confirm understanding
Numeracy	2.1, 3.1, 3.2	• Extracts, evaluates and compares numerical information to determine resources and identify trends
Get the work done	1.1, 1.5, 1.6, 2.1, 2.2, 2.5, 2.6, 3.1, 3.2	• Identifies changes to processes, products or services within scope of own business opportunities • May invest time in developing and shaping several options before making a final choice, using a combination of lateral and analytical thinking to tailor and strengthen an idea to suit needs, resources and constraints • Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share relevant information in increasingly effective ways.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB301 Investigate micro business opportunities	BSBSMB301A Investigate micro business 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

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Assessment Requirements for BSBSMB301 Investigate micro business 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:

- analyse information from a range of sources to investigate a business opportunity, including:
  - financial considerations
  - technical skills required to document, research and analyse market data and market changes
  - ethical and cultural requirements of the market
  - resource availability
  - risk management
- review data for potential impact.

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:

- locate and outline relevant legislation and regulation laws governing state and federal laws when starting and running a micro business in Australia
- locate and analyse theory of ethical culture including how theory can be applied to achieve positive ethical outcomes within the business
- identify sources of specialist advice such as trends in new and emerging markets and decline and risk factors
- describe appropriate business research methods and data collection tools including how to monitor trends using specialised software.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources for analysis of data
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB302 Develop a micro business proposal

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 research the feasibility of a business opportunity, and to present a business idea in formats suiting a range of stakeholders.

It applies to individuals who are establishing or operating a micro business providing self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Evaluate business opportunities	1.1 Identify and research key factors influencing viability of business ideas 1.2 Analyse business ideas in terms of personal or family needs and commitments 1.3 Evaluate impacts of emerging or changing technology, including e-commerce, on the opportunity 1.4 Determine viability of business opportunity in line with perceived risks, available resources, financial returns and other

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ELEMENT	PERFORMANCE CRITERIA
	outcomes sought 1.5 Assess and match personal skills/attributes against those perceived as necessary for a particular business opportunity 1.6 Identify and assess business risks according to resources available and personal preferences
2. Detail the business idea	2.1 Develop an accurate description of the business idea for key stakeholders 2.2 Develop an accurate summary of the major products and/or services required to suit personal needs and requirements
3. Prepare the business overview to suit different stakeholders	3.1 Present an accurate list of key stakeholders and their information requirements 3.2 Determine an acceptable method of presentation of information for each stakeholder 3.3 Provide accurate customised information to target audiences

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, 1.6	• Interprets information from a range of sources to determine business requirements
Writing	2.1, 2.2, 3.1, 3.3	• Uses factual information and industry related terminology to complete required documentation
Numeracy	1.4	• Extracts, evaluates and compares numerical information to aid research
Navigate the world of work	1.2, 1.5, 1.6	• Begins to develop some insights into various factors influencing career decisions, goals and possibilities
Get the work done	1.1, 1.3-1.6, 2.1, 2.2, 3.2, 3.3	• Plans and implements tasks required to prepare and present a business overview • Analyses and evaluates options before making decisions, considering needs, resources and constraints • Uses a range of digital tools to access, organise, integrate

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		and present relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB302 Develop a micro business proposal	BSBSMB302A Develop a micro business proposal	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

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Assessment Requirements for BSBSMB302 Develop a micro business proposal

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:

- analyse information from a range of sources to evaluate a business opportunity, including:
  - consideration of personal and family commitments
  - changing e-commerce and ability to operate software
  - risk management
  - personal skills analysis against required skills
- document and communicate the business idea, and products and services to stakeholders including:
  - customising information for each stakeholder.

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:

- summarise commonwealth, state/territory and local government legislative requirements relating to micro business operations
- explain how to manage income and expenditure costing in a micro business
- discuss regulations and codes of practice relevant to micro business operation
- outline principles of risk assessment relevant to the business opportunity.

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

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources for analysis of data
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB303 Organise finances for the micro business

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 estimate start-up costs, financial viability and projected cash flow for a micro business with reference to candidates' personal financial situation.

It applies to individuals who are establishing or operating a micro business providing self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Ascertain own financial position and ability to provide capital/equity for the business	1.1 Realistically detail personal, family or community financial situation showing funds available and commitments already incurred 1.2 Determine equity finance and assets available for micro business from personal, family or community sources
2. Determine projected cash flow for the business	2.1 Determine level of forecast business activity over a year and the business mix

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Estimate establishment costs for the business and repayment schedule for borrowings 2.3 Calculate monthly variable and fixed costs needed to conduct business activity over a year 2.4 Estimate personal drawings needed from the business 2.5 Estimate monthly income generated by the business for a year, based on price per unit item or hourly charge rate for labour 2.6 Develop a cash flow budget for the first year of business operation 2.7 Seek professional advice to estimate goods and services tax and operating finance required for the business
3. Source required funds to establish the business	3.1 Estimate required funding to establish and run the business based on expected sales and activity levels, available finances and commitments 3.2 Investigate methods of accessing alternative sources of finance 3.3 Identify strategies for meeting financial obligations 3.4 Implement plans to access available funds as required
4. Monitor business profitability	4.1 Maintain and review monthly expenditure and income records 4.2 Compare equity at beginning and end of a year to estimate business performance 4.3 Assess financial viability of the business after a year of operation 4.4 Seek professional advice on depreciation, insurance and tax implications of the business

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, 3.2, 4.1-4.3	• Gathers, interprets and analyses a variety of textual information from a range of sources and identifies relevant and key information

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Writing	1.1, 2.6, 2.7, 3.4, 4.4	• Uses factual information and industry related terminology to complete required workplace documentation
Oral Communication	1.1, 2.7, 4.4	• Articulates clearly using vocabulary and features suitable to audience • Uses listening and questioning techniques to seek information and confirm understanding
Numeracy	1.1, 1.2, 2.1-2.7, 3.1, 4.1-4.3	• Analyses numerical information to calculate revenue and expense forecasts and estimate funding required to run the business
Navigate the world of work	1.1	• Uses a systematic process for developing career, identifying personal commitments and accepting realistic possibilities
Get the work done	1.1, 1.2, 2.1-2.7, 3.1-3.4, 4.3, 4.4	• Determines priorities and sequences steps involved in clearly defined familiar tasks, and identifies and assembles resources required • Understands and explicitly applies some basic principles of analytical and lateral thinking • Uses main features and functions of digital tools to complete work tasks and access information • Usually seeks input and expert advice when decisions involve unfamiliar issues

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB303 Organise finances for the micro business	BSBSMB303A Organise finances for the micro business	Updated to meet Standards for Training Packages Minor edit to Element 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

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Assessment Requirements for BSBSMB303 Organise finances for the micro business

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:

- conduct an investigation of own financial position and needs
- determine projected cash flow for the business
- estimate the funding needed to establish and operate the business
- assess the financial viability of the business.

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 sources of specialist financial advice for small business operators
- describe appropriate accounting software for use in the business
- locate the Australia Taxation office (ATO) website and summarise data for operating a micro business
- describe personal attributes needed to run a successful small business
- list courses available for small business owners, including information on how to create a business plan
- summarise sales and marketing strategies
- list appropriate networking communities for small business operators.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources

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- relevant workplace documentation
- 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

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BSBSMB304 Determine resource requirements for the micro business

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 select options for resource acquisition, develop procedures and systems for efficient installation, and use and maintain resources.

It applies to individuals who are establishing or operating a micro business providing self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify resources needed in the business	1.1 Use the business profile to determine types of resources that may be required 1.2 Gather information regarding resource requirements from appropriate sources 1.3 Determine resource quantities in accordance with business activity levels and financial position

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ELEMENT	PERFORMANCE CRITERIA
2. Select appropriate sources for resources required in the business	2.1 Investigate different options for acquiring resources needed in the business in terms of business profile and stakeholder needs 2.2 Determine reliability, risks and costs associated with these options in line with business projections 2.3 Determine ease of access to sources of service and support 2.4 Select suitable options as investigated 2.5 Establish relationships with suppliers and other key people
3. Prepare for use of resources in the business	3.1 Design procedures and systems to allow effective and efficient introduction, use and maintenance of resources 3.2 Negotiate and review arrangements for supply of resources to ensure the business profile is met 3.3 Design procedures for monitoring use of resources 3.4 Develop procedures for maintenance, support, repair and replacement of business machinery, equipment and software

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, 3.1	• Gathers, interprets and analyses textual and numerical information from a range of sources and identifies relevant and key information
Writing	1.1, 1.3, 2.5, 3.1-3.4	• Uses factual information and industry related terminology to complete simple instructional documentation
Oral Communication	2.1, 2.5, 3.2	• Uses relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding
Numeracy	1.3, 2.2, 3.1	• Analyses numerical information to calculate resource and equipment expenditure
Interact with others	2.5	• Uses a range of communication strategies to establish a connection with others
Get the work	1.1-1.3, 2.1-2.4, 3.1,	• Plans, organises and implements tasks required to

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done	3.4	determine resource requirements • Invests some time in looking for new ideas and opportunities, selecting appropriate options as required • Considers effectiveness of a solution in terms of how well it meets business goals • Uses digital tools to access, organise, integrate and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB304 Determine resource requirements for the micro business	BSBSMB304A Determine resource requirements for the micro business	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

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Assessment Requirements for BSBSMB304 Determine resource requirements for the micro business

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:

- determine appropriate resource levels in line with business profile and desired profit
- select options for resource acquisition suited to the business and financial position, including stakeholder needs
- establish relationship with suppliers including negotiating and reviewing supplies to suit profile of business
- develop procedures and systems to allow for efficient and effective installation and use of resources, including monitoring and maintenance 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:

- identify commonwealth, state/territory and local government legislative requirements relating to business operations
- list functions of a range of business equipment and machinery (including information technology/communications systems and software)
- outline organisation’s business profile and structure
- state how often a business profile should be updated
- describe procedures and systems for use of and routine maintenance of resources
- summarise types of resources required as per the business profile.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant workplace documentation and resources including a business profile sample
- 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

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BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business

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 source advice and specialist services to manage business compliance requirements.

It applies to individuals who are establishing or operating a micro business providing self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify regulatory, taxation and insurance requirements of the business	1.1 Identify regulatory, taxation and insurance requirements that might be relevant to operation of the business 1.2 Gather information that assists in interpreting and explaining regulatory, taxation and insurance requirements 1.3 Investigate relationships between legislation, regulations, codes of practice, associated standards and written material to determine compliance requirements of the business

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ELEMENT	PERFORMANCE CRITERIA
2. Develop procedures to ensure compliance and risk minimisation	2.1 Identify business advisers and other sources of assistance relevant to compliance requirements and business type 2.2 Explain business type and operations to advisers, covering full scope of the business 2.3 Clarify and confirm compliance requirements and risk minimisation needs with advisers 2.4 Establish sources of advice and specialist services for regulatory, taxation and insurance compliance 2.5 Review advice and procedures against compliance requirements and their appropriateness for the business
3. Implement compliance procedures	3.1 Implement procedures within provided guidelines 3.2 Take action to ensure the business complies with relevant taxation and business registration requirements, legislation, regulations, codes of practice and associated standards 3.3 Arrange appropriate insurance cover for the business

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, 2.4, 2.5, 3.1-3.3	• Identifies and interprets legislative and regulatory information pertinent to business requirements
Writing	1.1, 2.1, 3.2, 3.3	• Develops material for a specific audience using clear and detailed language to clarify information and requirements
Oral Communication	2.2, 2.3, 3.3	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding
Numeracy	2.5, 3.3	• Analyses numerical information to calculate specific business requirements • Uses formal and informal mathematical language to discuss compliance

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Navigate the world of work	1.1, 1.3, 3.1, 3.2	• Develops and implements standard procedures • Takes some personal responsibility for adherence to legal and regulatory requirements
Get the work done	1.2, 1.3, 2.1, 2.4, 3.3	• Plans, organises and implements tasks required to determine compliance requirements • Understands and explicitly applies some basic principles of analytical and lateral thinking • Takes responsibility for the outcomes of routine decisions related directly to own role • Determines priorities and sequences steps involved in clearly defined familiar tasks, and identifies and assembles resources required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business	BSBSMB305A Comply with regulatory, taxation and insurance requirements for the micro business	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

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Assessment Requirements for BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business

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 regulatory, taxation and insurance compliance requirements, and risk minimisation needs of the business
- identify sources of advice on compliance and risk minimisation procedures for the business
- complete a development and review of procedures for compliance and risk minimisation (with assistance from advisers).

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 business registration and licensing requirements
- list commonwealth, state/territory and local government legislative requirements relating to business operation
- categorise the nature of legal responsibility
- pinpoint relevant industry codes of practice
- list relevant health and safety responsibilities
- name sources of advice and specialist services
- identify sources of information about regulatory, taxation and insurance requirements and issues
- outline taxation requirements.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB306 Plan a home based business

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 employ useful strategies to set up a business from home.

It applies to individuals who are establishing or operating a micro business providing self-employment.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Determine viability of basing a business in a home environment	1.1 Identify activities that will be undertaken by the business and what facilities and workspace are needed 1.2 Identify what licences, permits, regulations or restrictions apply to operating a home based business 1.3 Identify availability of services and infrastructure to support the business 1.4 Calculate costs of suitable fittings and equipment for the business and any modifications required to existing facilities and

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ELEMENT	PERFORMANCE CRITERIA
	infrastructure in the home 1.5 Determine access requirements of clients or delivery vehicles to the business premises 1.6 Identify insurance requirements for operation of the business in the home
2. Plan workplace in a home environment	2.1 Prepare a floor plan or layout that meets needs of the business and home occupants 2.2 Prepare any concept plans for modifications to buildings or structures in accordance with local government requirements 2.3 Obtain approvals from relevant authorities 2.4 Identify work health and safety (WHS) issues and develop procedures to eliminate or minimise any risks 2.5 Design workplace to provide appropriate client access and facilities while retaining privacy for home occupants 2.6 Allocate adequate and secure space for business machinery, equipment and storage of materials
3. Minimise potential sources of conflict	3.1 Identify possible sources of conflict with neighbours or home occupants 3.2 Develop protocols for home occupants, visitors and clients to enable the business to successfully operate in the home environment 3.3 Prepare a work schedule that identifies business and personal activities 3.4 Establish contingency plans for unanticipated events

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, 1.6, 2.2, 2.4	• Interprets all legislative and regulatory information pertinent to business requirements
Writing	1.6, 2.1, 2.3, 2.4, 3.2-3.4	• Uses factual information to complete required forms and workplace documentation

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Oral Communication	1.6, 2.3	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding
Numeracy	1.4	• Analyses numerical information to calculate equipment and infrastructure costs
Navigate the world of work	1.2, 2.2, 2.4, 3.2	• Appreciates implications of legal and regulatory responsibilities related to own work and recognises specific legal principles and protocols applicable across work context
Interact with others	2.3	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	1.1, 1.3-1.6, 2.1, 2.5, 2.6, 3.1, 3.3, 3.4	• Plans, organises and implements tasks required to determine needs for a home based business • Takes responsibility for outcomes of decisions related directly to own role • Recognises and takes responsibility for addressing and rectifying potential problems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB306 Plan a home based business	BSBSMB306A Plan a home based business	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

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Assessment Requirements for BSBSMB306 Plan a home based business

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 practical requirements of running a home based business, including calculation of costs
- plan suitable workspace, including:
  - preparing concept plan for possible modifications to structure of building
  - obtaining relevant approvals from external sources
  - following required legislation
- implement procedures and protocols to ensure home based business runs smoothly including:
  - creating work schedule
  - identifying and establishing contingency plans for areas of possible conflict.

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:

- list factors to consider in setting up a home based business, including prohibitive factors
- list commonwealth, state/territory and local government legislative requirements relating to business operation, especially for health and safety and environmental issues
- outline constraints of home based businesses
- summarise relevant services and available infrastructure.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- workplace office equipment and resources
- relevant legislation, regulations, standards and codes
- 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

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BSBSMB307 Set up information and communications technology for the micro business

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 information and communications technology (ICT) needs for a home-business operation and resolve common technological problems when they arise.

It applies to individuals who are establishing or operating a micro business providing self-employment. This is not a specialist information technology (IT) unit.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Determine information and communications technology requirements	1.1 Identify full range of hardware and software requirements relevant to anticipated start-up level of business and available space 1.2 Determine and decide on type of internet connection needed to fulfil business requirements 1.3 Identify suitable suppliers of hardware, software and appropriate support services

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Compare and analyse pricing and payment options to determine the most suitable information and communications technology goods and services for the business
2. Install hardware and software products	2.1 Determine suitable location for hardware, taking work health and safety (WHS) and environmental considerations into account 2.2 Follow set-up instructions for hardware in accordance with manufacturers' specifications 2.3 Follow instructions on installation for all software applications and upgrades 2.4 Install and test connection device in accordance with vendor instructions
3. Trouble shoot/resolve common malfunctions	3.1 Define problem to be resolved 3.2 Identify support services for common malfunctions 3.3 Follow instructions for resolving common malfunctions 3.4 Test device to ensure malfunction is resolved

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, 2.1-2.4, 3.1-3.3	• Interprets written and diagrammatic information when determining requirements or installing hardware and software
Oral Communication	1.3, 2.3, 3.1, 3.3	• Uses specific and relevant language to clearly articulate technological issues, and uses questioning and listening techniques to clarify solutions • Participates in verbal negotiations using tone and language suitable to audience
Numeracy	1.4	• Compares and calculates equipment costs within budgetary constraints
Navigate the world of work	2.1	• Appreciates implications of legal and regulatory responsibilities related to own work with specific reference to safety
Get the work	1.1-1.4, 2.1-2.4, 3.1,	• Plans, organises and implements tasks required to set

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done	3.2, 3.4	up information and communications technology • Implements actions as per plan, making slight adjustments as necessary and addressing some unexpected issues • Takes responsibility for outcomes of decisions related directly to own role • Follows instructions when responding to IT problems • Understands purposes, specific functions and key features of digital systems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB307 Set up information and communications technology for the micro business	BSBSMB307A Set up information and communications technology for the micro business	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

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Assessment Requirements for BSBSMB307 Set up information and communications technology for the micro business

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 and select appropriate hardware/software, including:
  - identifying suitable suppliers and support options
  - comparing pricing and payment options
- follow appropriate legislation including work health and safety (WHS) and environmental considerations
- install hardware and software products
- troubleshoot and resolve any malfunctions in technology.

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:

- summarise basic computer vocabulary required to identify problem areas for support
- outline WHS procedures for using electronic equipment
- identify current and relevant software packages for work requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- case studies and, where possible, real situations

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- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBSMB308 Improve energy efficiency in micro or small business operations

Modification History

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

Application

This unit describes the skills and knowledge required to improve energy efficiency in micro or small business operations, where energy efficiency improvements are readily apparent and easily made within existing budgets and business processes.

It applies to individuals responsible for implementing change who use analytical skills to implement identified energy efficiency options.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Determine where energy savings can be made	1.1 Identify types and sources of energy, and where energy is used in the business 1.2 Review business documents to determine which energy uses are significant expenses for the business 1.3 Collect information from a range of sources about energy saving options to identify areas for improvement

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ELEMENT	PERFORMANCE CRITERIA
2. Evaluate options for saving energy	2.1 Prepare a list of energy saving options that apply to the business 2.2 Determine costs and benefits for the business that apply to each option 2.3 Rank options according to costs and value of benefits to the business
3. Implement preferred options	3.1 Decide which options to implemented in the short term, and those which may be implemented in future 3.2 Set specifications and parameters for preferred options to assist in determining if improvements have been made 3.3 Plan how to implement preferred options 3.4 Engage staff, and external specialist services where required, in implementing preferred options
4. Monitor outcomes of change	4.1 Check options have been introduced to specifications 4.2 Monitor costs to check whether savings have been made 4.3 Gather information on other benefits to the micro or small business 4.4 Determine if outcomes have been met and savings are ongoing

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, 4.1, 4.3	• Organises, evaluates and critiques information from a range of textual material
Writing	2.1, 2.3	• Uses clear, specific and industry-related terminology to complete and update workplace documentation
Numeracy	2.2, 2.3, 4.2	• Analyses numerical information to determine business costs and benefits, and analyse and compare usage data
Interact with others	3.4	• Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability

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Get the work done	1.1, 1.3, 2.2, 2.3, 3.1-3.3, 4.3, 4.4	• Systematically gathers and analyses all relevant information • Takes responsibility for outcomes of routine decisions directly related to own role • Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints • Recognises value of continuous improvement within own work context where this involves incremental change

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB308 Improve energy efficiency in micro or small business operations	BSBSMB308A Improve energy efficiency in micro or small business operations	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

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Assessment Requirements for BSBSMB308 Improve energy efficiency in micro or small business operations

Modification History

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

Performance Evidence

Evidence of the ability to:

- access and review information relating to energy efficiency savings for a business
- compare costs and benefits to decide which energy efficiency option to choose
- make energy efficiency changes, involving other staff and advisors if needed
- monitor energy efficiency 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:

- explain key energy efficiency terms and concepts
- discuss amount and type of energy used in the business
- outline information sources on energy efficiency for micro or small business, and options specific to a particular business.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Small Business field of work and include access to:

- office equipment and resources for analysis of data
- relevant workplace documentation
- case studies and, where possible, real situations
- interaction with others.

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Assessors must satisfy NVR/AQTF assessor requirements.

Links

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BSBSMB401 Establish legal and risk management requirements of small business

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 and prioritise risks and identify and comply with all regulations affecting the business.

It applies to individuals operating a small business or setting up a department within a larger organisation, who are skilled at communicating and interpreting legislation and regulations.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify and implement business legal requirements	1.1 Identify and research possible options for the business legal structure using appropriate sources 1.2 Determine legislation and regulatory requirements affecting operations of the business under its chosen structure 1.3 Develop and implement procedures to ensure full compliance with relevant legislation and regulatory requirements
2. Comply with	2.1 Establish systems to ensure legal rights and responsibilities of

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ELEMENT	PERFORMANCE CRITERIA
legislation, codes and regulatory requirements	the business are identified and the business is adequately protected, specifically in relation to occupational health and safety (OHS), business registration and environmental requirements 2.2 Identify taxation principles and requirements relevant to the business, and follow procedures to ensure compliance 2.3 Identify and carefully maintain legal documents and maintain and update relevant records to ensure their ongoing security and accessibility 2.4 Monitor provision of products and services of the business to protect legal rights and to comply with legal responsibilities 2.5 Conduct investigations to identify areas of non-compliance with legal and regulatory requirements, and take corrective action where necessary
3. Negotiate and arrange contracts	3.1 Seek legal advice on contractual rights and obligations, if required, to clarify business liabilities 3.2 Investigate and assess potential products/services to determine procurement rights and ensure protection of business interests where applicable 3.3 Negotiate and secure contractual procurement rights for goods and services including contracts with relevant people, as required, in accordance with the business plan 3.4 Identify insurance requirements and acquire adequate cover 3.5 Identify options for leasing/ownership of business premises and complete contractual arrangements in accordance with the business plan

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, 2.1-2.4, 3.2-3.5	• Identifies, analyses and evaluates a range of complex text to determine legislative, regulatory and related business requirements
Writing	1.3, 2.1, 2.3, 2.5,	• Prepares written reports and workplace documentation that communicate complex information clearly and

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	3.1, 3.3, 3.5	effectively
Oral Communication	2.5, 3.1, 3.3	• Uses specific and relevant language to clearly articulate legal issues, and uses questioning and listening techniques to clarify solutions • Participates in verbal negotiations using language suitable to audience
Numeracy	2.2, 2.5, 3.3, 3.4	• Reviews, analyses, compares and contrasts numerical data which may be embedded in documents • Calculates business insurance costs and compares costing options
Navigate the world of work	1.2, 1.3, 2.1	• Monitors adherence to organisational policies and legislative responsibilities and considers own role in terms of its contribution to broader goals of work environment
Interact with others	3.1, 3.3	• Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others
Get the work done	1.1-1.3, 2.1	• Plans, organises and implements tasks required to determine legal and risk management requirements • Implements actions as per plan, making adjustments if necessary and addressing unexpected issues • Understands importance of secure information in relation to own work and takes personal responsibility for identifying and managing risk factors • Makes a range of critical and non-critical decisions in complex situations, taking a range of factors into account

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB401 Establish legal and risk management requirements of small business	BSBSMB401A Establish legal and risk management requirements of small business	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBSMB401 Establish legal and risk management requirements of small business

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:

- demonstrate a systematic approach to identifying, managing and meeting legal and business requirements, specifically in regard to OHS, business registration and environmental requirements
- ensure compliance, by:
  - following taxation principles
  - updating and maintaining legal documents
  - investigating areas of non-compliance
  - monitoring provision of products and services
  - taking corrective action where necessary
- negotiate and arrange contracts, including:
  - seeking legal advice
  - investigating procurement rights
  - following the business plan
  - identifying insurance requirements
  - identifying options of leasing/ownership of business premises.

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 registration and licensing requirements
- identify commonwealth, state/territory and local government legislative requirements relating to business operation
- explain creation and termination of relevant legal contracts

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- summarise relevant cultural differences and legal implications
- describe legal rights and obligations of alternative ownership structures
- outline necessary record keeping to meet minimum legal and taxation requirements
- summarise relevant consumer legislation and industry codes of practice
- explain relevant insurance requirements and products.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources for analysis of data
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB402 Plan small business 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 identify financial requirements of a business, including profit targets, cash flow projections and strategies to garner financial support.

It applies to individuals who operate a small business or work within an existing micro or small businesses or in a department of a larger organisation. Individuals in this role interpret financial data competently and are skilled communicators.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify costs, calculate prices and prepare profit statement	1.1 Identify and document costs associated with production and delivery of the business' products/services 1.2 Calculate prices based on costs and profit margin, as an hourly charge-out rate for labour or unit price for products 1.3 Calculate break-even sales point to establish business viability and profit margins 1.4 Identify appropriate pricing strategies in relation to market

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ELEMENT	PERFORMANCE CRITERIA
	conditions to meet business profit targets 1.5 Prepare projected profit statement to supplement the business plan
2. Develop a financial plan	2.1 Set profit targets/goals to reflect owner's desired returns 2.2 Identify working capital requirements necessary to attain profit projections 2.3 Identify non-current asset requirements and consider alternative asset management strategies 2.4 Prepare cash flow projections to enable business operation in accordance with business plan and legal requirements 2.5 Identify capital investment requirements accurately for each operational period 2.6 Select budget targets to enable ongoing monitoring of financial performance
3. Acquire finance	3.1 Identify start-up and ongoing financial requirements according to financial plan/budget 3.2 Identify sources of finance, including potential financial backers, to provide required liquidity for the business to complement business goals and objectives 3.3 Investigate cost of securing finance on optimal terms 3.4 Identify strategies to obtain finance as required to ensure financial viability of the business

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, 1.5, 2.1-2.5, 3.1, 3.2	• Identifies, analyses and evaluates complex information from a range of sources
Writing	1.1, 1.5, 2.1, 2.4, 3.2	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively

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Oral Communication	1.1, 3.2	• Uses specific and relevant language to secure finance and uses questioning and listening techniques to clarify outcomes • Participates in verbal negotiations using language suitable to audience
Numeracy	1.1-1.5, 2.1, 2.2, 2.4-2.6, 3.1, 3.3, 3.4	• Analyses numerical information to determine costs, prices, profit and losses, and other financial data
Navigate the world of work	2.4	• Appreciates implications of legal and regulatory responsibilities related to own work
Get the work done	1.1, 1.4, 2.1-2.3, 2.5, 2.6, 3.1, 3.2, 3.4	• Sequences and schedules tasks required to implement and monitor financial strategies • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account, making adjustments as necessary • Regularly uses formal thinking techniques to generate new ideas

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB402 Plan small business finances	BSBSMB402A Plan small business finances	Updated to meet Standards for Training Packages	Equivalent unit

Links

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Assessment Requirements for BSBSMB402 Plan small business 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:

- develop a financial plan which identifies financial requirements of the business, including cash flow projections and a projected profit statement
- follow the business plan, including:
  - demonstrating an awareness of appropriate legal requirements
  - implementing strategies to monitor financial performance
- identify sources and investigate costs of securing appropriate financial assistance.

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 break-even analysis
- clarify costing for the business, including margin/mark-up, hourly charge-out rates and unit costs
- summarise financial decision-making relevant to the business
- outline methods and relative costs of obtaining finance
- summarise principles for preparing balance sheets
- provide a detailed explanation of:
  - principles for preparation of cash flow forecasts
  - principles for preparation of profit and loss statements
  - purpose of financial reports
- describe working capital cycles.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources for financial calculations
- relevant workplace documentation
- 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

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BSBSMB403 Market the small business

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 improve business performance via a clear strategy complementing the business plan.

It applies to individuals who operate a small business independently or within a larger organisation. Individuals in this role analyse and interpret market data and are proficient communicators.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Develop marketing strategies	1.1 Analyse the business and its key products or services to determine focus of marketing activities, in accordance with objectives of the business plan 1.2 Evaluate customer base and target market for the small business as a basis for marketing objectives and strategies 1.3 Determine marketing objectives and strategies are ethically and culturally appropriate, in consultation with relevant people and in accordance with the business plan

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ELEMENT	PERFORMANCE CRITERIA
2. Determine a marketing mix for the business	2.1 Balance product mix, volumes and pricing to optimise sales and profit 2.2 Evaluate costs and benefits of using different distribution channels and/or providing different levels of customer service, and consider results in determining marketing mix 2.3 Determine promotional activities to suit target market 2.4 Consider customer needs and preferences in determining marketing mix 2.5 Determine marketing mix according to market and business needs
3. Implement marketing strategies	3.1 Brief those involved in the marketing effort on their roles and responsibilities, to ensure success of marketing strategies 3.2 Plan and implement promotional activities, in accordance with marketing objectives and budgetary requirements
4. Monitor and improve marketing performance	4.1 Monitor marketing activities and evaluate business performance according to objectives and targets of the business plan 4.2 Analyse performance gaps and take corrective action or set new targets 4.3 Encourage all relevant people to propose ways to improve marketing performance 4.4 Seek and analyse customer reaction to all aspects of the marketing mix, using culturally appropriate processes, to improve targeting and outcomes 4.5 Conduct ongoing research of customer requirements to identify opportunities for change and improvement 4.6 Monitor and investigate market changes for new opportunities to aid business development

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

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Reading	1.1-1.3, 2.2-2.4, 3.2, 4.1, 4.4, 4.6	• Identifies, analyses and evaluates complex information from a range of sources
Writing	1.3, 2.3, 2.5, 3.1, 3.2, 4.4-4.6	• Prepares reports and other workplace documentation using structure, layout and terminology appropriate to the audience
Oral Communication	1.3, 3.1, 4.3, 4.4	• 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	2.1, 2.2, 3.2, 4.2	• Analyses numerical information to determine budgetary requirements and product quantities • Uses a range of calculation methods to evaluate costs and benefits
Navigate the world of work	4.5	• Regularly reviews current situation and develops strategies to address improvements in marketing performance
Interact with others	4.3	• Recognises importance of building rapport to establish effective working relationships
Get the work done	1.1-1.3, 2.1-2.5, 3.2, 4.1, 4.2	• Plans, organises and implements tasks required to develop and implement marketing strategies • Implements actions as per plan, making slight adjustments if necessary and addressing some unexpected issues • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account • Identifies concepts, principles and features of approaches in use in other contexts, and redesigns these to suit own situation • Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB403 Market the small business	BSBSMB403A Market the small business	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status

Links

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

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Assessment Requirements for BSBSMB403 Market the small business

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:

- determine objectives of the business plan, including marketing activity focus
- evaluate customer base
- understand what is ethically and culturally appropriate
- determine a marketing mix according to market and business needs, including:
  - ability to optimise sales and profit
  - ability to evaluate costs and benefits
  - determine customer needs and promotional activities
- determine marketing strategies, including briefing appropriate personnel on their responsibilities
- monitor and evaluate activities and performance, and correct performance gaps
- consult and communicate effectively with relevant people
- research and monitor ongoing changes and 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:

- discuss industry market trends
- identify performance evaluation methods
- explain methods of analysing costs and benefits of marketing strategies
- summarise methods of developing marketing objectives and marketing mix
- outline methods of monitoring customer satisfaction
- identify relevant market analysis and research
- provide a detailed explanation of relevant marketing concepts and methods.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources for analysis of data
- relevant workplace documents
- 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

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BSBSMB404 Undertake small business 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 research and develop an integrated business plan for achieving business goals and objectives.

It applies to individuals who operate a small business that operates independently, or as part of a larger organisation. Individuals in this role interpret business information and numerical data competently and are skilled communicators.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify elements of the business plan	1.1 Identify purpose of the business plan 1.2 Identify and review essential components of the business plan 1.3 Identify and document business goals and objectives as a basis for measuring business performance
2. Develop a business plan	2.1 Research resources, legal and compliance requirements, specifically in relation to occupational health and safety (OHS), in accordance with business goals and objectives

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Research market needs, and market size and potential 2.3 Identify sources and costs of finance, from financial plan, to provide required liquidity and profitability for the business 2.4 Identify methods, from marketing strategies, to promote market exposure of the business 2.5 Identify methods/means of production/operation from production/operations plan to conform with business goals and objectives 2.6 Identify staffing requirements to effectively produce/deliver products/services 2.7 Identify specialist services and sources of advice, where required, and cost in accordance with available resources
3. Develop strategies for minimising risks	3.1 Identify specific interests and objectives of relevant people and seek and confirm their support of planned business direction 3.2 Identify and develop risk management strategies according to business goals and objectives, and relevant legal requirements 3.3 Develop a contingency plan to address possible areas of non-conformance with the plan

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, 2.1-2.7, 3.1, 3.2	• Identifies, analyses and evaluates complex workplace documentation during planning process
Writing	1.3, 2.3-2.7, 3.1-3.3	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	3.1	• Articulates ideas and requirements using language appropriate to audience
Numeracy	2.2, 2.3, 2.5-2.7	• Interprets numerical information to determine prospective markets, resource allocations and business profits/losses

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Navigate the world of work	2.1, 3.2	• Appreciates implications of legal and regulatory responsibilities related to own work
Get the work done	1.1, 1.2, 2.1-2.7, 3.2, 3.3	• Plans, organises and implements tasks required to develop a business plan • Implements actions as per plan, making slight adjustments if necessary, and addressing some unexpected issues • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account • Identifies concepts, principles and features of approaches in use in other contexts, and redesigns these to suit own situation • Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB404 Undertake small business planning	BSBSMB404A Undertake small business 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

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Assessment Requirements for BSBSMB404 Undertake small business 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 a business plan which provides for finance, marketing and provision of products/services to facilitate all business goals and objectives
- identify and plan all work health and safety (WHS) responsibilities
- develop risk management strategies including a contingency plan for non-conformance.

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 commonwealth, state/territory and local government legislative requirements and industry codes of practice relating to small business planning
- explain methods of evaluation
- summarise WHS responsibilities and procedures for identifying hazards relevant to the business
- outline planning processes
- describe preparation of a business plan
- identify principles of risk management relevant to business planning
- explain reasons for, and benefits of, business planning
- outline setting goals and objectives
- explain types of business planning – feasibility studies; strategic, operational, financial and marketing planning.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB405 Monitor and manage small business operations

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 a business plan and modify operations as required.

It applies to individuals who operate a small business which stands alone, or is part of a department within a larger organisation. Individuals in this role are skilful communicators and interpret numerical data with ease.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Develop operational strategies and procedures	1.1 Develop an action plan to provide a clear and coherent direction, in accordance with business goals and objectives 1.2 Identify work health and safety (WHS) and environmental issues, and implement strategies to minimise risk factors 1.3 Develop a quality system for the business in line with industry standards, compliance requirements and cultural criteria 1.4 Develop performance measures and operational targets to

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ELEMENT	PERFORMANCE CRITERIA
	conform with the business plan 1.5 Develop strategies for innovation, including utilisation of existing, new or emerging technologies, where practicable, to optimise business performance
2. Implement operational strategies and procedures	2.1 Implement systems and key performance indicators/targets to monitor business performance and customer satisfaction 2.2 Implement systems to control stock, expenditure/cost, wastage/shrinkage and risks to health and safety in accordance with the business plan 2.3 Maintain staffing requirements, where applicable, within budget, to maximise productivity 2.4 Carry out provision of goods/services in accordance with established legal, ethical cultural and technical standards 2.5 Provide goods/services in accordance with time, cost and quality specifications, and customer requirements 2.6 Apply quality procedures to address product/service and customer requirements
3. Monitor business performance	3.1 Regularly monitor/review achievement of operational targets to ensure optimum business performance, in accordance with business plan goals and objectives 3.2 Review systems and structures, with a view to more effectively supporting business performance 3.3 Investigate and analyse operating problems to establish causes and implement changes as required, as part of the business quality system 3.4 Amend operational policies and procedures to incorporate corrective action
4. Review business operations	4.1 Review and adjust business plan, as required, to maintain business viability, in accordance with business goals and objectives 4.2 Clearly record proposed changes to aid future planning and evaluation 4.3 Undertake ongoing research into new business opportunities and adjust business goals and objectives as new business opportunities arise

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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, 2.1, 2.2, 2.4, 2.5, 3.1, 4.1	• Evaluates complex text to determine legislative, regulatory and workplace documentation
Writing	1.1, 1.3-1.5, 3.2, 3.4, 4.1, 4.2	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	3.2	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and employs listening and questioning techniques to confirm understanding
Numeracy	2.2, 2.3, 2.5	• Interprets numerical information to manage performance information and regulate cash flow
Navigate the world of work	1.1-1.3, 2.2, 2.4, 4.1	• Develops and revises organisational policies and procedures • Appreciates implications of legal and regulatory responsibilities related to own work with specific reference to safety
Get the work done	1.1, 1.3-1.5, 2.1-2.3, 2.5, 2.6, 3.1-3.3, 4.1, 4.3	• Plans, organises and implements tasks required to implement strategies and procedures • Reflects on how digital systems and tools are used or could be used to achieve work goals • Identifies concepts, principles and features of approaches in use in other contexts and considers how these may suit own situation • Uses experiences to reflect on how variables impact decision outcomes, and to gain insights into what constitutes ‘good’ judgement and an effective decision in different contexts

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSMB405 Monitor and manage	BSBSMB405A Monitor and manage	Updated to meet Standards for	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
small business operations	small business operations	Training Packages	

Links

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

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Assessment Requirements for BSBSMB405 Monitor and manage small business operations

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 strategies and procedures to successfully manage business operations, including:
  - developing an action plan
  - identifying risk management procedures
  - developing a quality system
  - implementing performance measures
  - utilising technologies to optimise business performance
- implement and monitor strategies and procedures developed, including:
  - analysing and correcting business problems
  - reviewing and adjusting the business plan
- record and research business improvements
- make appropriate adjustments to business operations 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 methods for implementing operation and revenue control systems
- summarise methods for monitoring performance and implementing improvements
- outline work health and safety (WHS) responsibilities and procedures for managing hazards
- identify relevant principles of risk management, including risk assessment
- clarify quality system principles and methods
- explain relevant marketing, sales and financial concepts
- summarise relevant performance measures

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- outline systems to manage staff, stock, expenditure, services and customer service
- identify technical or specialist skills relevant to business operations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB406 Manage small business 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 implement and review financial management strategies on a regular basis.

It applies to individuals who operate a small business that stands alone, or is part of a department within a larger organisation. Individuals in this role are skillful communicators and interpret financial reports and other numerical data with ease.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Implement financial plan	1.1 Identify financial information requirements and obtain specialist services, as required, to profitably operate and extend the business in accordance with the business plan 1.2 Produce financial budgets/projections, including cash flow estimates, as required for each forward period, and distribute to relevant people in accordance with legal requirements 1.3 Negotiate, secure and manage business capital to best enable implementation of the business plan and to meet requirements of

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ELEMENT	PERFORMANCE CRITERIA
	financial backers 1.4 Develop and maintain strategies to enable adequate financial provision for taxation in accordance with legal requirements 1.5 Develop, monitor and maintain client credit policies, including contingencies for debtors in default, to maximise cash flow 1.6 Select key performance indicators to enable ongoing monitoring of financial performance 1.7 Record and communicate financial procedures to relevant people to facilitate implementation of the business plan
2. Monitor financial performance	2.1 Regularly monitor and report on financial performance targets, and analyse data to establish extent to which the financial plan has been met 2.2 Monitor marketing and operational strategies for their effects on the financial plan 2.3 Calculate and evaluate financial ratios according to own/industry benchmarks 2.4 Assess financial plan to determine whether variations or alternative plans are needed, and change 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	Performance Criteria	Description
Reading	1.1-1.4, 2.1, 2.4	• Evaluates complex text to determine legislative, regulatory and workplace documentation
Writing	1.2-1.5, 1.7, 2.1	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	1.3, 1.7	• Provides clear explanations using language and features suitable to the audience • Uses listening and questioning techniques to confirm understanding
Numeracy	1.1-1.5, 2.1, 2.3, 2.4	• Interprets numerical information to calculate all relevant financial information

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Navigate the world of work	1.2, 1.4	• Appreciates implications of legal and regulatory responsibilities related to own work
Interact with others	1.3, 1.7	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role • Uses effective negotiation skills to achieve outcomes
Get the work done	1.1, 1.2, 1.4-1.6, 2.2, 2.4	• Plans, organises and implements tasks required to manage finances • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account • Uses formal and informal processes to monitor implementation of ideas and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB406 Manage small business finances	BSBSMB406A Manage small business 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

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Assessment Requirements for BSBSMB406 Manage small business 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:

- operate and extend the business according to the business plan, including:
  - adhering to legal requirements
  - meeting requirements of financial backers
  - defining strategies for contingencies for debtors
  - defining key performance indicators
  - communicating with relevant personal
- monitor the business against financial plan and make changes 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:

- discuss benchmarking
- explain financial decision-making relevant to the business
- summarise significant financial indicators
- outline purposes of financial reports
- clarify preparation and interpretation of budget/actual reports
- identify principles for preparing balance sheets and their interpretation
- characterise principles for preparing profit and loss statements and their interpretation
- discuss stock records / stock control relevant to the business.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant workplace documentation
- 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

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BSBSMB407 Manage a small team

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 select, induct, train and develop staff members to enhance business operations within the parameters of all relevant legislative requirements.

It applies to individuals who operate a small business that stands alone, or is part of a department within a larger organisation. Individuals in this role have a good knowledge of industrial relations and team management and use effective, responsive and supportive communication in workplace interactions.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Develop staffing plan	1.1 Determine staffing requirements to allow the business to run effectively, in accordance with requirements outlined in the business plan 1.2 Identify and compare existing skills/competencies of owner/s and staff with business requirements to identify any gaps 1.3 Develop policies and procedures for owner/s and staff, in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with the business plan
2. Recruit, induct, train and retain team	2.1 Develop job/position descriptions, competencies required and selection criteria to meet business' needs 2.2 Judge information obtained from each candidate against specified selection criteria, and select according to business needs and legal requirements 2.3 Induct new staff members in accordance with policies and procedures of the business 2.4 Make team members aware of their responsibilities and performance requirements as soon as practicable, and take opportunities to coach team members who are unfamiliar with procedures of the business 2.5 Develop and implement a staff development program and career paths based on requirements of business and staff competencies 2.6 Advertise staff vacancies appropriately in accordance with staffing plan
3. Comply with industrial relations obligations	3.1 Clarify workplace rights and obligations of employers and employees, in accordance with legal requirements and codes of practice 3.2 Counsel staff, if required, in a positive and constructive manner and record outcomes accurately
4. Maintain staff records	4.1 Develop staff records system to provide timely and accurate information, in accordance with confidentiality, legal and taxation requirements 4.2 Monitor and accurately maintain system for recording and retrieving personnel and payroll information, and seek specialist advice where required
5. Manage staff	5.1 Regularly review contribution and skills of self and other team members to ensure performance is in line with agreed performance measures 5.2 Monitor and adjust staffing requirements to respond to any changes in tasks and functions required by the business 5.3 Support and encourage staff, and acknowledge and reward their contribution 5.4 Regularly provide opportunities for staff to discuss work related issues 5.5 Develop contingency plans to cope with unexpected or extreme

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ELEMENT	PERFORMANCE CRITERIA
	situations and take appropriate corrective action as required
6. Review team performance	6.1 Develop positive and constructive relationships with and between team members 6.2 Review and update team objectives in support of business goals on a regular basis in consultation with team members 6.3 Identify strengths and weaknesses of team against current and expected work requirements 6.4 Schedule time, on a regular basis, for team members to review work operations to maintain and improve operational efficiency 6.5 Encourage team members to monitor their own performance, suggest improvements and identify professional development needs, in accordance with personal and business requirements 6.6 Monitor and review staff turnover rate

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, 2.5, 2.6, 3.1, 4.1, 4.2, 5.1, 6.3, 6.5, 6.6	• Evaluates complex text to determine legislative, regulatory and workplace documentation
Writing	1.3, 2.1-2.6, 3.1, 3.2, 4.1, 4.2, 5.5, 6.1-6.3, 6.5	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	1.2, 2.3, 2.4, 3.2, 4.2, 5.3, 5.4, 6.1, 6.2, 6.5	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and employs listening and questioning techniques to confirm understanding • Participates in verbal negotiations and coaching using language suitable to audience
Numeracy	6.4	• Uses basic mathematical formulas to review staff performances within available work schedules
Navigate the	1.3, 2.2, 2.3, 3.1, 4.1	• Applies understanding of legal responsibilities to the planning and implementation of tasks

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world of work		• Develops and revises organisational policies and procedures
Interact with others	1.2, 2.4, 3.2, 5.3, 5.4, 6.1, 6.2, 6.5	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction • Looks for ways of establishing connections and building genuine understanding with a diverse range of people • Actively identifies important communication exchanges, selecting appropriate channels and format to suit purpose and audience
Get the work done	1.1, 1.2, 2.2, 2.3, 2.5, 4.2, 5.1, 5.2, 5.5, 6.3, 6.4, 6.6	• Plans, organises and implements tasks required to manage a team • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account • Uses formal and informal processes to monitor implementation of ideas and reflect on outcomes • Anticipates potential problems and has contingency plans ready for implementation • Uses digital technologies and systems to enter, store and access information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB407 Manage a small team	BSBSMB407A Manage a small team	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

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Assessment Requirements for BSBSMB407 Manage a small team

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:

- use the business plan to:
  - determine staffing requirements
  - conduct skill-gap staff training
  - develop policies and procedures
- develop job descriptions and selection criteria
- determine induction processes
- implement staff development program
- adhere to legal requirements and codes of practice
- develop staff records system
- conduct ongoing performance measures
- communicate effectively with staff members
- develop contingency plans
- develop strategies to review team performance
- monitor and review staff 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:

- discuss legislative requirements relating to the business operation
- explain work health and safety responsibilities and procedures for managing hazards
- summarise relevant industry awards/enterprise agreements
- outline approaches to staff development and career planning
- summarise staff counselling, grievance and disciplinary procedures
- identify unfair dismissal legislation and procedures.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB408 Manage personal, family, cultural and business obligations

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 examine the impact personal, family and cultural obligations have on business operations, and to develop and implement strategies to improve business success.

It applies to individuals who operate small or micro businesses. In this role, individuals use analytical skills to identify their own obligations, and communication skills to explain business ideas and issues to others.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Identify personal and business commitments/ obligations within family, cultural and community contexts	1.1 Identify personal, family, cultural and/or community contexts the business operates in 1.2 Identify personal, family, cultural and/or community commitments/obligations that impact the business 1.3 Consider strategies to address and minimise negative impacts these commitments/obligations may have on the business

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Prepare workable plans to address and minimise impact these issues have
2. Develop ethical work practices within family, cultural and community contexts	2.1 Develop a culturally appropriate work ethic in terms of personal, family and community obligations, and cultural requirements 2.2 Identify and implement strategies to reinforce a culturally appropriate work ethic in the business 2.3 Prepare contingency plans for when alternative action is required due to changes within the business, family, cultural and/or community environments
3. Review work practices within family, cultural and community contexts	3.1 Monitor personal, family, cultural and/or community commitments/obligations to identify any changes that might impact the business 3.2 Review plans and strategies to ensure negative impacts of any commitments/obligations are addressed, and implement any necessary changes 3.3 Monitor implementation of culturally appropriate work ethic to ensure it is supported and maintained in the business

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, 3.2	• Recognises and interprets textual information to address improvements to work practices
Writing	1.4, 2.3, 3.2	• Uses clear and specific terminology to complete and update workplace documentation
Oral Communication	1.1, 1.2	• Provides clear information using language appropriate to audience and environment
Navigate the world of work	1.1, 1.2, 2.1, 2.2, 3.3	• Considers the features of cultural and ethical environment that impact on a business
Get the work done	1.1-1.4, 2.2, 2.3, 3.1-3.3	• Plans, organises and implements tasks required to manage multiple obligations • Makes a range of critical and non-critical decisions in

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		relatively complex situations, taking a range of factors into account • Uses formal and informal processes to monitor implementation of ideas and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB408 Manage personal, family, cultural and business obligations	BSBSMB408B Manage personal, family, cultural and business obligations	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

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Assessment Requirements for BSBSMB408 Manage personal, family, cultural and business obligations

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:

- produce a detailed analysis of the implications of family, cultural and community obligations/commitments on self, staff and the business
- produce plans and strategies that show the workability of maintaining a culturally appropriate work ethic for the business
- produce plans and strategies to address negative impacts that obligations or commitments may have on the business.

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:

- briefly outline the characteristics of the small business and the environment in which it operates
- explain the impact of family and community expectations or needs on the business
- outline any specific historical, cultural, ceremonial, religious, family or community issues that impact on the business.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant workplace documentation
- case studies and, where possible, real situations.

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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

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BSBSMB409 Build and maintain relationships with small business stakeholders

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, develop and review relationships with small business key stakeholders.

It applies to individuals who operate a small business and need to consider a range of factors in establishing communication practices.

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

Unit Sector

Management and Leadership – Small and Micro Business

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 and develop communication and appropriate relationships with key stakeholders	1.1 Establish specific practices for communication with key stakeholders, in accordance with codes of practice, cultural protocols and agreed roles and responsibilities 1.2 Maintain specific ways of dealing with issues in communication with key stakeholders, adhering to codes of practice, cultural protocols and agreed roles and responsibilities 1.3 Identify and implement methods of working in culturally appropriate ways

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify and implement plans to deal with changes in circumstances and behaviours, as required
2. Establish and develop roles and responsibilities in the small business	2.1 Clearly and accurately clarify roles and responsibilities in the business in accordance with organisational structure and lines of authority, codes of practice and job documentation 2.2 Identify and apply specific practices and behaviours from codes of practice, that contribute to successful working relationships 2.3 Clearly communicate responsibilities and practices to key stakeholders
3. Review relationships with key stakeholders	3.1 Review communication practices used with key stakeholders and implement any necessary improvement strategies 3.2 Monitor and evaluate relationships with key stakeholders and develop action plan/s needed to enhance relationships 3.3 Evaluate roles and responsibilities in the business and undertake any revisions necessary to improve working relationships

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, 2.2, 3.1, 3.2, 3.3	• Interprets texts from relevant sources to identify information on job descriptions and codes of practice
Writing	1.1, 2.1, 2.3, 3.2, 3.3	• Prepares specific information, which conveys an understanding of outcomes and alternatives, using terminology appropriate for a range of audiences
Oral Communication	1.1, 2.3, 3.1	• Explains requirements, and participates in discussions, using language and features appropriate to audience and environment, • Uses questioning and listening skills to exchange ideas/solutions and check understanding
Navigate the world of work	1.1, 1.3, 2.1	• Understands and adheres to legal, ethical and organisational requirements

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Interact with others	1.1, 1.2, 1.3, 2.2, 2.3	• Selects communication practices and protocols to suit purpose and audience • Seeks to build relationships and work cooperatively with a diverse range of people
Get the work done	1.1, 1.4, 2.1, 3.1, 3.2, 3.3	• Plans, organises and implements tasks required to manage relationships, with an awareness of how the tasks contribute to the goals of the business • Analyses and considers a range of factors to make critical and non-critical decisions in relatively complex situations • Uses formal and informal processes to monitor outcomes of decisions and identify changes needed

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB409 Build and maintain relationships with small business stakeholders	BSBSMB409A Build and maintain relationships with small business stakeholders	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

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Assessment Requirements for BSBSMB409 Build and maintain relationships with small business stakeholders

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 and communicate with key stakeholders based on the roles and responsibilities, codes of practice and cultural protocols for the business
- develop and communicate roles, responsibilities, duties and tasks of small business personnel to key stakeholders
- develop a process for monitoring and reviewing relationships with key stakeholders
- develop an action plan for improving relationships with key stakeholders.

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 codes of practice that affect communication practices
- explain the cultural protocols that affect communication practices
- explain the impact of individual roles and responsibilities on communication practices
- discuss the relevance of business ethics to building business relationships.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant workplace documentation, including codes of practice
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBSMB410 Review and implement energy efficiency in business operations

Modification History

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

Application

This unit describes the skills and knowledge required to undertake a structured review and analysis of data relating to energy use, and to plan for energy efficiency in a small business or work area within a larger organisation.

It applies to individuals who use analytical and problem-solving skills and take responsibility for adopting and promoting approaches to improve energy efficiency.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Determine ways to measure energy use	1.1 Determine and rank in order of importance key drivers for improving energy efficiency in the business 1.2 Identify types of energy used in the business and what energy is used for 1.3 Decide what will be measured, and how 1.4 Source and use tools such as checklists and spreadsheets to

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ELEMENT	PERFORMANCE CRITERIA
	collate energy use measurements 1.5 Source and seek advice of specialists if required, to assist with measuring and analysing energy use
2. Measure and analyse energy use	2.1 Measure and record use of different types of energy used in the business 2.2 Estimate use of energy where direct measurement is not possible 2.3 Analyse energy use for trends, and compare with industry standards where appropriate 2.4 Interpret data and advice provided by specialist advisors if used
3. Determine ways to improve energy efficiency	3.1 Propose methods to improve energy efficiency based on analysis of energy use and related information 3.2 Undertake a cost-benefit analysis of proposed methods to determine the business case for making changes
4. Develop an energy efficiency plan	4.1 Identify energy efficiency improvements that can be implemented immediately, and those which require further consideration or are longer-term goals 4.2 Prioritise energy efficiency improvements considering business opportunities and risks relating to managing energy use 4.3 Develop a plan to show what will be done, and how and when, and document it following 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	Performance Criteria	Description
Reading	1.1, 1.4, 1.5, 2.3, 2.4, 3.2, 4.1, 4.2	• Organises, evaluates and critiques information from a range of textual material
Writing	1.1, 1.4, 3.1, 4.2, 4.3	• Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations

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Numeracy	2.1, 2.2, 3.2	• Analyses numerical information to determine business costs and benefits, and analyse and compare usage data
Oral communication	1.5	• Uses listening and questioning skills to confirm understanding of requirements
Navigate the world of work	4.3	• Adheres to organisational policies and procedures
Get the work done	1.1-1.4, 2.3, 3.1, 3.2, 4.1, 4.2	• Plans, organises and implements tasks required to achieve improvements in energy efficiency • Uses analytical processes to evaluate options and make decisions • Uses digital tools to enter, collate, analyse and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB410 Review and implement energy efficiency in business operations	BSBSMB410A Review and implement energy efficiency in business operations	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

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Assessment Requirements for BSBSMB410 Review and implement energy efficiency in business operations

Modification History

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

Performance Evidence

Evidence of the ability to:

- measure energy use, using at least two different tools
- propose improvements and document a plan for energy efficiency based on analysis of data and information
- use outcomes from a cost-benefit analysis to prioritise energy efficiency improvements
- implement energy efficiency plan and make improvements
- monitor and review 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:

- explain key energy efficiency terms and concepts
- outline amount and type of energy used in the business
- summarise sources of information about energy efficiency and options specific to the business
- describe key components of an implementation plan or business case for energy efficiency.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant workplace documentation

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- 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

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BSBSMB411 Manage specialist external advisory services

Modification History

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

Application

This unit describes the skills and knowledge required to identify and select suitable external advisory services for a small business or work area operation, and to monitor and review services provided.

It applies to individuals who use research and organisational skills in planning the introduction of new or specialist services, resources or processes.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Locate specialist external advisory services	1.1 Identify skill gaps of current staff to determine nature of external expertise required to meet the business need 1.2 Research specialist services to determine if there are any specific industry or regulatory requirements that apply 1.3 Prioritise services required by the business and document according to organisational procedures 1.4 Determine estimated cost of services and identify budget or

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ELEMENT	PERFORMANCE CRITERIA
	funding source to purchase external expertise
2. Select a specialist advisor or company	2.1 Organise a quote or advertise for provision of specialist service according to organisational requirements 2.2 Establish process and criteria for shortlisting potential contractors 2.3 Select most suitable applicant according to established criteria and business' requirements and procedures 2.4 Document selection process and outcome, following organisational procedures 2.5 Ensure successful and unsuccessful applicants are advised of outcome and provided with feedback if needed
3 Negotiate services to be provided	3.1 Review and clearly specify terms and conditions of quotation or contract 3.2 Clarify and confirm what is required of specialist advisor, including expectations of performance and outcomes 3.3 Obtain and action legal advice on contract requirements, if necessary 3.4 Formally sign off on quotation or contract following organisational procedures 3.5 Familiarise specialist advisor with the business and its personnel as part of induction
4. Monitor performance	4.1 Check milestones and deliverables are achieved according to terms and conditions of quotation or contract 4.2 Discuss progress and review against agreed terms and conditions in line with organisational procedures 4.3 Collaborate to raise any issues or concerns, and follow up and document according to organisational procedures 4.4 Organise progress and final payments against milestones and key deliverables in a timely manner according to organisational procedures 4.5 Evaluate effectiveness and suitability of specialist advisor in achieving objectives

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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, 3.1, 4.1	• Organises, evaluates and critiques information from a wide variety of textual material
Writing	1.3, 2.2, 2.4, 2.5, 3.1, 3.2, 3.4, 3.5	• Develops material for a specific audience, using clear language and workplace conventions, to convey explicit information, requirements and recommendations
Numeracy	1.4, 4.4	• Analyses numerical information to determine business costs and benefits, and analyse and compare usage data
Oral Communication	2.5, 3.2, 3.5, 4.2, 4.3	• Uses listening and questioning skills to confirm understanding of requirements • Uses appropriate, detailed and clear language to provide information to a range of audiences
Navigate the world of work	1.2, 1.3, 2.1, 2.3, 2.4, 3.3, 3.4, 4.2-4.4	• Appreciates implications of legal and regulatory responsibilities related to own work • Adheres to organisational policies and procedures
Get the work done	1.1, 1.3, 1.4, 2.1-2.3, 2.5, 3.3, 4.1, 4.4, 4.5	• Plans, organises and implements the tasks required to engage and work with external advisory services, according to organisational requirements • Uses analytical processes to evaluate choices against criteria and make decisions • Monitor implementation of solutions and reflects on outcomes

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSMB411 Manage specialist external advisory services	BSBSMB411A Manage specialist external advisory services	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBSMB411 Manage specialist external advisory services

Modification History

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

Performance Evidence

Evidence of the ability to:

- locate and select a specialist external advisory service relevant to the business, that meets specific organisational requirements including:
  - identifying skill gaps of current staff
  - identifying relevant industry, regulatory and organisational requirements
- document selection process and outcomes according to organisational procedures
- agree on and document services to be provided with the successful advisor
- provide successful advisor with an induction program and ongoing feedback as required
- monitor milestones and deliverables, and evaluate effectiveness of specialist external advisory services against agreed terms and conditions.

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 the key steps in engaging external specialist advisors or services
- summarise the specialist services which may be required by a small business
- summarise specific organisational, industry or regulatory requirements relating to specialist advisory services for the business, including:
  - required licences, industry registration, government approval, and professional membership
  - minimum qualifications
  - vendor approval or certification.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- office equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation
- 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

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BSBSMB412 Introduce cloud computing into business operations

Modification History

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

Application

This unit describes the skills and knowledge required to understand the fundamentals of internet computing and cloud services. It involves undertaking a basic review of business computing needs and identifying options for introducing cloud computing services into a small business or work area in an organisation.

It applies to individuals who use problem-solving skills and take responsibility for adopting and promoting approaches to improve business operations.

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

Unit Sector

Management and Leadership – Small and Micro Business

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. Review computing needs in the business	1.1 Review current computing resources and use, and document according to organisational requirements 1.2 Identify and discuss future computing needs and potential improvements to business operations with staff or team members 1.3 Collate information collected in review, and summarise business computing needs in line with organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
2. Investigate cloud computing services to meet business needs	2.1 Research fundamentals of cloud computing, types of services offered, and their costs 2.2 Seek assistance from specialist advisors as required, to determine relevant cloud computing services 2.3 Undertake basic cost-benefit analysis for introducing cloud computing 2.4 Identify potential opportunities and risks associated with introducing cloud computing 2.5 Prepare a business case for implementing cloud computing services or other required changes, and seek approval where required
3. Develop a plan to introduce cloud computing	3.1 Prioritise introduction of cloud computing, including short-term and longer-term goals 3.2 Prepare a budget catering for short and long-term priorities, following organisational format and requirements 3.3 Independently or through services of a specialist advisor, outline steps and activities required to introduce cloud computing into the business
4. Support implementation of the plan	4.1 Communicate and promote key features of the plan to others 4.2 Organise training and coaching to maximise cloud computing potential 4.3 Encourage and support individuals and work groups to become more efficient using cloud computing

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	• Organises, evaluates and critiques information from a wide variety of textual material
Writing	1.1, 1.3, 2.5, 3.2, 3.3, 4.1	• Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations

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Numeracy	2.1, 2.3, 3.2	• Analyses numerical information to plan business budgets and analyse and compare data
Oral communication	1.2, 2.5, 4.1, 4.3	• Uses appropriate, detailed and clear language to address key personnel and share information • Uses listening and questioning skills to confirm understanding of requirements
Navigate the world of work	1.1, 1.3, 3.2	• Appreciates implications of legal and regulatory responsibilities related to own work • Adheres to organisational policies and procedures
Interact with others	1.2, 2.2, 3.3, 4.3	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • May seek expert guidance of others in specific areas
Get the work done	1.2, 1.3, 2.1, 2.2, 2.4, 2.5, 3.1, 4.2	• Plans and implements tasks required to develop a cloud computing plan • Uses analytical skills to identify computing use and business needs and decide on solutions • Reflects on ways digital systems and tools are used, or could be used, to achieve work goals, and begins to recognise strategic and operational applications

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB412 Introduce cloud computing into business operations	BSBSMB412A Introduce cloud computing into business operations	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

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Assessment Requirements for BSBSMB412 Introduce cloud computing into business operations

Modification History

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

Performance Evidence

Evidence of the ability to:

- review and analyse business computing needs, including equipment and software requirements, and business use
- analyse research information about cloud computing including:
  - seeking assistance from specialist advisor as required
  - performing cost-benefit analysis
  - identifying potential risks
- make the business case to introduce cloud computing
- prepare plan and support others to implement cloud computing.

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 fundamentals of cloud computing, including key terms and concepts
- outline sources of information about cloud computing for micro or small business, and options specific to the business
- describe organisational format and requirements for preparing a budget
- summarise organisational protocols for using services of specialist advisors.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

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- office equipment and resources
- software for analysis of numerical data
- relevant workplace documentation
- 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

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BSBSUS201 Participate in environmentally sustainable work practices

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 effectively measure current resource use and carry out improvements, including reducing the negative environmental impact of work practices.

It applies to individuals, working under supervision or guidance, who are required to follow workplace procedures and instructions, and 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

Industry Capability – Sustainability

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. Identify current resource use	1.1 Identify workplace environmental and resource efficiency issues 1.2 Identify resources used in own work role 1.3 Document and measure current usage of resources using appropriate techniques 1.4 Record and file documentation measuring current usage, using

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ELEMENT	PERFORMANCE CRITERIA
	technology (such as software systems) where applicable 1.5 Identify and report workplace environmental hazards to appropriate personnel
2. Comply with environmental regulations	2.1 Follow workplace procedures to ensure compliance 2.2 Report breaches or potential breaches to appropriate personnel
3. Seek opportunities to improve resource efficiency	3.1 Follow organisational plans to improve environmental practices and resource efficiency 3.2 Work as part of a team, where relevant, to identify possible areas for improvements to work practices in own work area 3.3 Make suggestions for improvements to workplace practices in own work area

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, 3.1	• Recognises and interprets textual information to establish job requirements from relevant information
Writing	1.3, 1.4, 1.5, 2.2	• Completes documents using required formats
Oral Communication	1.5, 2.2, 3.3	• Articulates ideas clearly and uses simple and relevant language to identify and report issues to designated person
Numeracy	1.3	• Calculates basic metric measurements to determine resource usage
Navigate the world of work	2.1	• Understands and adheres to legal and regulatory responsibilities related to own work
Interact with others	1.5, 2.2, 3.2, 3.3	• 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
Get the work	1.1-1.4, 3.1, 3.3	• Implements actions as per plan, taking some responsibility for sequencing and timing of tasks

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done		• Uses main features and functions of digital tools to complete work tasks and access information • Analyses current practices to identify opportunities for improvement.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS201 Participate in environmentally sustainable work practices	BSBSUS201A Participate in environmentally sustainable work practices	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

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Assessment Requirements for BSBSUS201 Participate in environmentally sustainable work practices

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:

- locate and interpret a range of environment/sustainability legislation and procedural requirements
- participate in and support discussions for an improved resource efficiency process
- identify, document and measure usage of resources
- collaborate with team members on suggestions for improving workplace practices.

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 environmental and resource hazards/risks as well as environmental or sustainability legislation, regulations and codes of practice applicable to own role
- outline sustainability requirements in the workplace
- identify reporting channels and procedures to report breaches and potential issues
- identify where to find environmental and resource efficiency systems and procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sustainability field of work and include access to:

- documentation, information and resources related to workplace environmental and resource efficiency issues
- office equipment and resources
- case studies and, where possible, real situations

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- 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

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BSBSUS301 Implement and monitor environmentally sustainable work practices

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 effectively analyse the workplace in relation to environmentally sustainable work practices and to implement improvements and monitor their effectiveness.

It applies to individuals with responsibility for a specific area of work or who lead a work group or team and addresses the knowledge, processes and techniques necessary to implement and monitor environmentally sustainable work practices, including the development of processes and tools.

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

Unit Sector

Industry Capability – Sustainability

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. Investigate current practices in relation to resource usage	1.1 Identify environmental regulations applying to the enterprise 1.2 Analyse procedures for assessing compliance with environmental/sustainability regulations 1.3 Collect information on environmental and resource efficiency systems and procedures, and provide to the work group where

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ELEMENT	PERFORMANCE CRITERIA
	appropriate 1.4 Collect, analyse and organise information from a range of sources to provide information/advice and tools/resources for improvement opportunities 1.5 Measure and document current resource usage of members of the work group 1.6 Analyse and document current purchasing strategies 1.7 Analyse current work processes to access information and data to 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 improvement strategies	3.1 Source and use appropriate techniques and tools to assist in achieving efficiency targets 3.2 Apply continuous improvement strategies to own work area of responsibility, including ideas and possible solutions to communicate to the work group and management 3.3 Implement and integrate environmental and resource efficiency improvement plans for own work group with other operational activities 3.4 Supervise and support team members to identify possible areas for improved practices and resource efficiency in work area 3.5 Seek suggestions and ideas about environmental and resource efficiency management from stakeholders and act upon where appropriate 3.6 Implement costing strategies to fully utilise environmental assets
4. Monitor performance	4.1 Use and/or develop evaluation and monitoring, tools and technology 4.2 Document and communicate outcomes to report on efficiency targets to key personnel and stakeholders 4.3 Evaluate strategies and improvement plans 4.4 Set new efficiency targets, and investigate and apply new tools and strategies 4.5 Promote successful strategies and reward participants where possible

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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, 1.6, 1.7, 2.3, 3.1	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Reviews reported information to evaluate workplace strategies and improvement practices
Writing	1.5, 1.6, 2.1, 2.2, 2.4, 3.1-3.3, 4.4, 4.5	• 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
Oral Communication	2.1, 2.2, 3.3-3.5, 4.4, 4.5	• 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
Numeracy	1.5, 2.4, 3.1, 3.6, 4.4	• Analyses numerical information to measure usage and calculates metric measurements, quantities/ratios and financial data using appropriate tools
Navigate the world of work	1.1, 1.2	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Interact with others	1.3, 2.1, 2.2, 3.3-3.5, 4.2, 4.4, 4.5	• 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
Get the work done	1.2, 1.4-1.7, 2.3, 2.4, 3.1, 3.2, 3.3, 3.5, 3.6, 4.1, 4.3, 4.4	• 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 • Uses the main features and functions of digital tools to

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		complete work tasks and access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSUS301 Implement and monitor environmentally sustainable work practices	BSBSUS301A Implement and monitor environmentally sustainable work practices	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

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Assessment Requirements for BSBSUS301 Implement and monitor environmentally sustainable work practices

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:

- analyse information from a range of sources to identify current procedures, practices and compliance requirements in relation to environmental and resource sustainability
- consult and communicate with relevant stakeholders to seek input and encourage engagement with developing and implementing sustainability improvements, encourage feedback and suggestions and report on outcomes
- plan and organise work group activities to:
  - measure current resource usage
  - solve problems and generate ideas for improvements
  - evaluate and implement strategies to improve resource usage
  - plan, implement and integrate improvements into operations
  - meet environmental requirements
- apply continuous improvement approach to sustainability performance
- apply change management techniques to support sustainability 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:

- identify relevant internal and external sources of information and explain how they can be used to identify sustainability improvements
- explain the compliance requirements for the work area with reference to legislation, regulations, codes of practice and workplace procedures that relate to environmental and resource issues
- outline common environmental and energy efficiency issues within the industry

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- give examples of benchmarks for environmental and resource sustainability that are relevant to the organisation
- outline organisational systems and procedures that relate to environmental and resource sustainability improvements including:
  - supply chain, procurement and purchasing
  - quality assurance
  - making recommendations and seeking approvals

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sustainability field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBSUS501 Develop workplace policy and procedures for sustainability

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 a workplace sustainability policy and to modify the policy to suit changed circumstances.

It applies to individuals with managerial responsibilities who undertake work developing approaches to create, monitor and improve strategies and policies within workplaces and engage with a range of relevant stakeholders and specialists.

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

Unit Sector

Industry Capability – Sustainability

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. Develop workplace sustainability policy	1.1 Define scope of sustainability policy 1.2 Gather information from a range of sources to plan and develop policy 1.3 Identify and consult stakeholders as a key component of the policy development process 1.4 Include appropriate strategies in policy at all stages of work for

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ELEMENT	PERFORMANCE CRITERIA
	minimising resource use, reducing toxic material and hazardous chemical use and employing life cycle management approaches 1.5 Make recommendations for policy options based on likely effectiveness, timeframes and cost 1.6 Develop policy that reflects the organisation's commitment to sustainability as an integral part of business planning and as a business opportunity 1.7 Agree to appropriate methods of implementation, outcomes and performance indicators
2. Communicate workplace sustainability policy	2.1 Promote workplace sustainability policy, including its expected outcome, to key stakeholders 2.2 Inform those involved in implementing the policy about expected outcomes, activities to be undertaken and assigned responsibilities
3. Implement workplace sustainability policy	3.1 Develop and communicate procedures to help implement workplace sustainability policy 3.2 Implement strategies for continuous improvement in resource efficiency 3.3 Establish and assign responsibility for recording systems to track continuous improvements in sustainability approaches
4. Review workplace sustainability policy implementation	4.1 Document outcomes and provide feedback to key personnel and stakeholders 4.2 Investigate successes or otherwise of policy 4.3 Monitor records to identify trends that may require remedial action and use to promote continuous improvement of performance 4.4 Modify policy and or procedures as required to ensure improvements are made

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

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Reading	1.1, 1.2, 4.2, 4.3	• Identifies, analyses and evaluates complex textual information to determine legislative and regulatory requirements, trends and outcomes
Writing	1.2-1.7, 2.1, 2.2, 3.1, 3.3, 4.1, 4.3, 4.4	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	1.2, 1.3, 2.1, 2.2, 3.1, 4.1	• 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
Numeracy	1.5, 4.3	• Interprets and uses mathematical equations to calculate numerical information relating to time durations and costs
Navigate the world of work	1.1-1.6, 3.1, 4.4	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	1.2, 1.3, 2.1, 2.2, 3.1, 3.3, 4.1, 4.3	• 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 a range of stakeholders
Get the work done	1.2, 1.4-1.7, 2.3, 2.4, 3.1, 3.2, 3.3, 3.5, 3.6, 4.1, 4.3, 4.4	• Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirements • 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 against agreed criteria • Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS501 Develop workplace policy and	BSBSUS501A Develop workplace policy and procedures	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
procedures for sustainability	for sustainability	Minor edits to clarify performance criteria	

Links

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

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Assessment Requirements for BSBSUS501 Develop workplace policy and procedures for sustainability

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:

- scope and develop organisational policies and procedures that comply with legislative requirements and support the organisation's sustainability goals covering at a minimum:
  - minimising resource use
  - resource efficiency
  - reducing toxic material and hazardous chemical use
  - employing life cycle management approaches
  - continuous improvement
- plan and implement sustainability policy and procedures including:
  - agreed outcomes
  - performance indicators
  - activities to be undertaken
  - assigned responsibilities
  - record keeping, review and improvement processes
- consult and communicate with relevant stakeholders to generate engagement with sustainability policy development, implementation and continuous improvement
- review and improve sustainability policies.

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 the environmental or sustainability legislation, regulations and codes of practice applicable to the organisation identify internal and external sources of information and explain how they can be used to plan and develop the organisation's sustainability policy

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- explain policy development processes and practices
- outline organisational systems and procedures that relate to sustainability
- outline typical barriers to implementing policies and procedures in an organisation and possible strategies to address them.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sustainability field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBWHS201 Contribute to health and safety of self and others

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 in a manner that is healthy and safe in relation to self and others and to respond to emergency incidents. It covers following work health and safety (WHS) and emergency procedures and instructions, implementing WHS requirements and participating in WHS consultative processes.

It applies to individuals who require a basic knowledge of WHS to carry out work in a defined context under direct supervision or with some individual responsibility, in a range of industry and workplace 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 *Act* 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Work safely	1.1 Follow provided safety procedures and instructions when

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ELEMENT	PERFORMANCE CRITERIA
	working 1.2 Carry out pre start systems and equipment checks according to workplace procedures 1.3 Follow workplace procedures for responding to emergency incidents
2. Implement work safety requirements	2.1 Identify designated persons to whom queries and concerns about safety in the workplace should be directed 2.2 Identify existing and potential hazards in the workplace, report them to designated persons and record them according to workplace procedures 2.3 Identify and implement WHS procedures and work instructions 2.4 Identify and report emergency incidents and injuries to designated persons according to workplace procedures 2.5 Identify WHS duty holders and their duties for own work area
3. Participate in WHS consultative processes	3.1 Contribute to workplace meetings, inspections and other WHS consultative activities 3.2 Raise WHS issues with designated persons according to organisational procedures 3.3 Take actions to eliminate workplace hazards and reduce risks

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, 2.3, 2.4, 2.5	• Identifies and interprets information in relation to WHS and emergency incidents
Writing	1.2, 2.2, 2.4, 3.2	• Uses structures and language appropriate to audience and context in reports giving factual information
Oral Communication	2.2, 2.3, 2.4, 3.1, 3.2	• Uses structures and language appropriate to audience and context in reports, descriptions, opinions and explanations • Extracts meaning from reports,

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		descriptions, opinions and explanations
Navigate the world of work	1.1, 1.2, 1.3, 2.1,2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3	• Takes responsibility for following WHS legal requirements • Follows protocols and procedures related to own role • Seeks assistance from others when WHS issues are beyond scope of immediate responsibilities
Get the work done	1.1, 1.2, 1.3, 2.2, 2.3, 2.4, 3.1, 3.3	• Plans, organises and implements routine tasks in order to optimise health and safety • Selects and implements actions from predetermined procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS201 Contribute to health and safety of self and others	BSBWHS201A Contribute to health and safety of self and others	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS201 Contribute to health and safety of self and others

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 all relevant procedures and instructions relating to work health and safety (WHS) and emergency incidents
- identify and report hazards to designated personnel
- contribute to WHS consultative 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:

- explain workplace safety procedures and instructions including:
  - checking systems and equipment
  - conducting routine work operations
  - requirements for personal protective equipment (PPE)
  - how to report incidents and injuries
- explain emergency procedures including those for fires and incidents
- define the meaning of commonly used hazard signs and safety symbols
- summarise the duty holder responsibilities, as specified in WHS Acts, regulations and codes of practice, of:
  - self and fellow workers
  - persons conducting businesses or undertakings (PCBUs)
  - officers
  - others in the workplace
- explain the difference between hazards and risks

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- describe typical WHS hazards that may be present in the workplace, the harm they can cause and how this harm occurs
- outline the process of hazard identification and risk reduction.

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:

- relevant organisational policies, standard operating procedures and work instructions
- relevant Acts, regulations, codes of practice
- workplace tools, equipment and resources
- personal protective equipment appropriate to the role and work area.

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

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BSBWHS301 Maintain workplace safety

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 and monitor the 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 a key role in maintaining workplace safety in an organisation. In their role they closely monitor aspects of work associated with the safe delivery of products and services, and they have a responsibility for influencing safety in the workplace.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Assist with	1.1 Use WHS legislation as the basis for meeting the health and

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ELEMENT	PERFORMANCE CRITERIA
incorporating WHS policies and procedures into work team processes	safety requirements of a small work team 1.2 Assist in providing and clearly explaining information to the work team about the organisation's WHS policies, procedures, programs and legislative requirements 1.3 Assist in regularly providing and clearly explaining information to the work team about identifying hazards and risk assessment outcomes
2. Support participative arrangements for managing WHS	2.1 Implement and monitor organisational consultative procedures to facilitate participation of the work team in managing work area WHS 2.2 Deal promptly with issues raised through consultation according to organisational procedures for issue resolution 2.3 Encourage and assist work team members to contribute to managing WHS 2.4 Engage with individuals and work teams to identify and implement improvements in managing WHS feedback
3. Support the organisation's procedures for providing WHS training	3.1 Provide advice on WHS training needs of individuals and the work team 3.2 Provide advice on strategies and opportunities for developing work team's WHS competence 3.3 Provide coaching and mentoring assistance to work team members to support the effective development of individual and team WHS competence
4. Participate in identifying hazards, and assessing and controlling risks for the work area	4.1 Provide advice on hazards in the work area according to organisational policies and procedures, and WHS legal requirements 4.2 Support the implementation of procedures to control risks using the hierarchy of control and according to organisational procedures and WHS legal requirements 4.3 Identify and report inadequacies in existing risk control measures according to organisational procedures, the hierarchy of control and WHS legal requirements 4.4 Accurately complete and maintain WHS incident records in the work area according to organisational procedures and WHS legislative requirements

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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	• Interprets and analyses legislative and organisational documentation • Applies appropriate strategies to construct meaning from legislative and organisational documentation
Writing	1.2, 1.3, 4.3, 4.4	• Documents WHS information using required format and industry specific vocabulary
Oral communication	1.2, 1.3, 3.3	• Presents information using language appropriate to audience • Uses questioning and active listening to confirm understanding
Navigate the world of work	1.1, 1.2, 2.2, 4.1, 4.2, 4.3	• Follows policies, procedures and legislative requirements relevant to own role • Keeps up to date on changes to legislation or regulations relevant to own role
Interact with others	2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 4.1, 4.3, 4.4	• Selects appropriate communication protocols and conventions to provide information to others • 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 • Beginning to provide feedback to others in forms they can engage with and respond to in the context of encouraging participative contributions
Get the work done	2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 4.1, 4.2, 4.3, 4.4	• Sequences and schedules activities, monitors implementation and manages relevant communication • Initiates standard procedures when responding to issues raised through consultation • Uses feedback to identify and implement opportunities improve arrangements for managing WHS issues to improvement

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS301 Maintain workplace safety	BSBWHS301A Maintain workplace safety	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS301 Maintain workplace safety

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:

- implement and monitor the organisation's work health and safety (WHS) policies and procedures
- identify hazards and assess and control risks
- assist in explaining and improving WHS policies, procedures and legislative requirements applicable to the organisation
- assist in explaining hazards identification and risk assessment outcomes to other team members
- implement and monitor consultation about WHS according to legislative and organisational requirements
- deal promptly with issues raised as a result of WHS consultation
- encourage work team to contribute to identifying and implementing improvements to WHS feedback
- assist others to develop WHS competence and provide advice on training needs
- complete WHS 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:

- describe characteristics and composition of the work team
- describe procedures for identifying hazards and assessing and controlling associated risks to health and safety, including the hierarchy of control
- outline organisational WHS policies and procedures including those relating to risk management, fire, emergencies, evacuation, incident investigation and reporting

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- describe relevant Acts, regulations and codes of practice from all levels of government that impact on business operations, especially with regard to WHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- identify WHS aspects of other organisational systems and procedures.

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:

- safety processes relevant to the area of work
- organisational policies and procedures, standard operating procedures and plans
- WHS Acts, regulations, codes of practice, licensing requirements and standards
- appropriate office equipment and resources used in the identification and rectification of WHS compliance breaches.

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

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BSBWHS302 Apply knowledge of WHS legislation in the workplace

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 comply with work health and safety (WHS) Acts, regulations and codes of practice in the workplace.

This unit applies to individuals who contribute to actions to achieve compliance with WHS legislation as part of their WHS responsibilities, which are in addition to their main duties.

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.

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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine the legal framework for WHS in	1.1 Identify and access current WHS legislation and related documentation relevant to the workplace, occupation and industry

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ELEMENT	PERFORMANCE CRITERIA
the workplace	1.2 Apply knowledge of the relationship between WHS Acts, regulations and codes of practice to assist in identifying WHS legislative requirements in the workplace 1.3 Identify duty holders 1.4 Identify legal obligations and duties for who to consult with regarding training of workers and health and safety representatives 1.5 Identify consequences of non-compliance with WHS Acts, regulations, codes of practice, standards and organisational WHS policies, procedures, processes and systems
2. Contribute to activity that reflects WHS legislative requirements	2.1 Contribute to monitoring compliance with legislation 2.2 Contribute to ensuring that workplace complies with legislation 2.3 Identify and take appropriate action on non-compliance with legislation 2.4 Recognise limits of own expertise and legal duties, and access help and advice when required
3. Keep up-to-date with legislation and relevant publications	3.1 Use relevant sources to keep up-to-date with legislation and relevant publications 3.2 Communicate information on relevant legislative changes and relevant publications to others

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	3.1	• Identifies and evaluates information from formal and informal sources to update knowledge
Reading	1.1-1.5, 3.1	• Interprets a range of textual information to determine regulatory and procedural requirements and necessary actions
Writing	2.3, 3.2	• Documents WHS information in a sequential manner using required format, correct grammar and industry specific language
Oral	2.1, 2.2, 2.3, 3.2	• Provides information or advice using language appropriate to audience

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communication		• Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	2.1- 2.3, 3.1	• Follows policies, procedures and legislative requirements relevant to own role • Keeps up to date on changes to legislation or regulations relevant to own role
Interact with others	2.4, 3.2	• Selects appropriate communication protocols and conventions to provide or seek information
Get the work done	1.1-1.5, 2.3, 3.1	• Plans, sequences and prioritises tasks and activities to support compliance with WHS regulatory requirements • Initiates standard procedures in response to non-compliance issues, requesting assistance if necessary • 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**
BSBWHS302 Apply knowledge of WHS legislation in the workplace	BSBWHS302A Apply knowledge of WHS legislation in the workplace	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS302 Apply knowledge of WHS legislation in the workplace

Modification History

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

Performance Evidence

Evidence of the ability to:

- identify and apply work health and safety (WHS) legislative requirements applicable to the workplace, occupation and industry, including keeping up to date with legislation and relevant publications
- identify and act on non-compliances with WHS legislation
- identify duty holders
- communicate WHS information to others
- refer issues of non-compliance to responsible persons or authorities and seek advice from appropriate 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 the WHS legislative duties of self and others including limits on own expertise
- outline the key organisational WHS policies, procedures, processes and systems
- outline the key requirements in relevant commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material, and other relevant publications
- identify obligations and duties for consultation and who must be consulted
- identify people who could be accessed for help
- identify the consequences of non-compliance
- explain ways to get information about compliance with legislation.

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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:

- organisational policies, standard operating procedures, procedures and plans with information on compliance requirements
- relevant Acts, regulations, codes of practice, licensing requirements and standards
- guidance materials and alerts issued by the relevant WHS regulator
- relevant WHS data files
- appropriate 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

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BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control

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 maintain a healthy and safe workplace through participation in the process of identifying work health and safety (WHS) hazards and assessing and controlling WHS risks, and the promotion and support of worker consultation.

It applies to individuals who assist with the identification of workplace hazards and the assessment and control of WHS risks as part of their WHS responsibilities, which are in addition to their main duties.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1. Participate in workplace hazard identification	1.1 Participate in selecting hazard identification methods suitable for the workplace 1.2 Use selected methods to identify, report and record hazards according to workplace procedures and WHS Acts, regulations and codes of practice 1.3 Provide information and assistance to persons conducting hazard identification
2. Participate in WHS risk assessment	2.1 Participate in selecting suitable risk assessment methods for the workplace 2.2 Use selected methods to assess and record risks according to workplace procedures and WHS Acts, regulations and codes of practice 2.3 Provide information and assistance to persons conducting risk assessments
3. Promote and support worker consultation and participation in hazard identification and risk assessment	3.1 Advise workers of, and consult them about, hazard identification and risk assessment activities, according to workplace WHS consultation and participation policies, procedures and processes 3.2 Encourage workers to participate in these activities according to workplace WHS consultation and participation policies, procedures and processes 3.3 Advise workers of, and consult them about, the results and outcomes of these activities, according to workplace WHS consultation and participation policies, procedures and processes
4. Participate in developing, selecting and implementing WHS risk controls	4.1 Obtain workplace records of the outcomes of hazard identifications and risk assessments, and use them to participate in developing risk control options 4.2 Apply knowledge of WHS Acts, regulations, codes of practice, other information and guidelines, and workplace policies, procedures and processes to identify duty holders 4.3 Participate in selecting risk control options using appropriate criteria 4.4 Identify and report factors impeding successful implementation of selected risk controls 4.5 Participate in developing a risk control implementation and evaluation plan 4.6 Provide information about the implementation and evaluation plan to individuals and parties

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ELEMENT	PERFORMANCE CRITERIA
5. Support effective worker consultation and participation in the risk control process	5.1 Advise workers of, and consult them about, developing risk control options, and selecting and implementing risk controls, according to workplace WHS consultation and participation policies, procedures and processes 5.2 Encourage workers to participate in these activities according to workplace WHS consultation and participation policies, procedures 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 4.1, 4.3, 4.4	• Interprets and identifies information from WHS legislation, workplace policy and procedure and records
Writing	1.2, 1.3, 2.2, 2.3, 3.1-3.3, 4.5, 4.6, 5.1, 5.2	• Uses formats and language appropriate to audience and context in plans, reports and general advice
Oral communication	1.1-1.3, 2.1-2.3, 4.6	• Presents information or assistance using appropriate levels of industry specific vocabulary • Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	1.2, 2.2, 3.1, 3.3, 4.2, 5.1, 5.2	• Follows legal and regulatory responsibilities and organisational policies and procedures in relation to WHS role • Keeps up to date on changes to WHS legislation or regulations and organisational policies and procedures
Interact with others	1.1, 1.3, 2.1, 2.3, 3.2, 3.3, 4.3, 4.5, 4.6, 5.1, 5.2	• Understands 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 perspectives of others and encouraging

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		participation
Get the work done	1.1, 1.2, 2.1, 2.2, 4.3	• Plans and implements tasks to achieve required outcomes • Uses formal 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control	BSBWHS303A Participate in WHS hazard identification, risk assessment and risk control	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control

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:

- participate in selection and use of 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.

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 the relevant Commonwealth and state or territory Acts, regulations, codes of practice standards, guidance material and other relevant publications
- summarise work health and safety (WHS) legislative requirements about:
  - communication, consultation and participation
  - notification of incidents
  - recordkeeping
  - specific hazard identification and risk assessment and control methods
- list the basic principles of incident causation and injury processes
- explain the concept of hazards, risks and risk factors
- describe hazard identification and risk assessment methods
- identify internal and external sources of WHS information and data, and how to access them
- summarise organisational WHS policies, procedures, processes and systems

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- describe the range of WHS hazards that may be present in the workplace, the harm they can cause and how this harm occurs
- describe risk control options for different hazards and work situations
- identify types of hazard and risk registers
- describe the workplace communication processes for sharing information about hazard identification, and risk assessment and control.

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:

- organisational policies, standard operating procedures and plans
- Acts, regulations, codes of practice, licensing requirements and standards
- relevant data files
- appropriate resources to manage the identification and rectification of breaches in compliance 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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BSBWHS304 Participate effectively in WHS communication and consultation processes

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 participate in work health and safety (WHS) communication and consultation processes.

It applies to individuals who participate in WHS communication and consultation processes as part of their work health and safety responsibilities, which are in addition to their main duties.

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.

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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to	1.1 Apply knowledge of WHS Acts, regulations, codes of practice,

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ELEMENT	PERFORMANCE CRITERIA
establishing and running WHS consultation and participation processes	policies and procedures to contribute to the development and running of WHS consultation and participation processes 1.2 Identify and communicate barriers to effective WHS consultation and participation processes 1.3 Contribute to removing these barriers 1.4 Identify, record and communicate to others, the duties, rights and responsibilities of individuals and parties in the consultation process
2. Raise WHS issues with others	2.1 Raise relevant WHS issues in meetings and support others to do this 2.2 Record and communicate WHS discussions and their outcomes in accordance with workplace procedures 2.3 Effectively follow up the outcomes of meetings as appropriate 2.4 Communicate outcomes of these meetings to others
3. Contribute to obtaining and communicating information about WHS issues	3.1 Identify sources of WHS information 3.2 Use tools and techniques to locate and obtain WHS information 3.3 Communicate relevant WHS information to others using appropriate communication methods

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, 3.1, 3.2	• Interprets a range of textual information to determine regulatory and procedural requirements and necessary actions
Writing	1.2, 1.4, 2.2, 2.4, 3.3	• Records key information in a sequential manner using required format, correct grammar and industry specific vocabulary
Oral Communication	1.2, 1.4, 2.1, 2.2, 2.4, 3.3	• Present information using language and non-verbal features appropriate to audience • Uses questioning and listening techniques to obtain feedback from others and resolve issues
Navigate the	1.1, 2.2	• Follows policies, procedures and legislative

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world of work		requirements relevant to own role
Interact with others	1.1, 1.4, 2.1, 2.2, 2.4, 3.3	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts • Uses appropriate interpersonal skills to encourage contributions and elicit ideas from others
Get the work done	1.1-1.4, 2.1, 2.3, 3.1-3.3	• Sequences and schedules activities, monitors implementation and manages relevant communication • Identifies barriers to consultation and applies problem solving processes to determine possible solutions • Uses the main features and functions of digital tools to access information or communicate effectively

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS304 Participate effectively in WHS communication and consultation processes	BSBWHS304A Participate effectively in WHS communication and consultation processes	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS304 Participate effectively in WHS communication and consultation processes

Modification History

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

Performance Evidence

Evidence of the ability to:

- participate in work health and safety (WHS) communication and consultation processes, including communicating WHS information to others
- raise WHS issues in meetings and follow up on outcomes
- take appropriate actions to remove barriers to communication and consultation processes
- support others to raise relevant WHS issues.

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 purpose of organisational WHS policies, procedures, processes and systems
- outline the key requirements of relevant commonwealth and state/territory WHS Acts, regulations, codes of practice, standards and guidance material, and other relevant publications
- describe potential barriers to WHS consultation processes and how the barriers may be overcome
- explain the roles and responsibilities of WHS personnel
- describe how the consultation process influences and is related to workplace information management procedures, processes and systems
- describe methods to engage others with workplace procedures, and information sourcing and sharing.

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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:

- organisational policies, standard operating procedures, procedures and plans with information on compliance requirements
- relevant Acts, regulations, codes of practice, licensing requirements, standards
- relevant WHS data files
- appropriate 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

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BSBWHS305 Contribute to WHS issue resolution

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 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.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to contribute to the resolution of WHS issues	1.1 Identify relevant parts of WHS Acts, regulations, codes of practice and workplace policies and procedures that apply to the WHS issue-resolution process 1.2 Identify possible participants in the WHS issue-resolution

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ELEMENT	PERFORMANCE CRITERIA
	process and their legal rights, duties and responsibilities 1.3 Identify, clarify and record WHS issues and communicate and discuss these issues with other participants as appropriate 1.4 Provide support and advice to workers about issue-resolution tools, techniques and strategies that can be used to resolve WHS issues 1.5 Make other preparations as necessary
2. Progress the resolution of WHS issues	2.1 Participate in the issue-resolution process 2.2 Provide support and advice to participants as appropriate according to workplace procedures and processes 2.3 Contact external participants to help progress issue-resolution processes when appropriate
3. Effectively communicate outcomes of WHS issue-resolution process	3.1 Select the best means to communicate the results of the issue-resolution process to participants 3.2 Disseminate results of the issue-resolution process to all participants 3.3 Contribute to keeping records of WHS issue-resolution processes and outcomes

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, 3.3	• Interprets texts relating to WHS legislation, workplace policy and procedures • Interprets documentation relating to specific issues
Writing	1.3, 1.4, 2.2, 2.3, 3.2, 3.3	• Uses formats and language appropriate to audience and context in plans, summaries, reports and advice
Oral communication	1.3, 1.4, 2.1-2.3, 3.2, 3.3	• Presents information, provides assistance, or engages in discussions using vocabulary and features appropriate to the audience • Uses listening and questioning to clarify and confirm understanding

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Navigate the world of work	1.1, 1.2	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures in relation to WHS role • Keeps up to date on changes to WHS legislation or regulations and organisational policies and procedures
Interact with others	1.4, 2.1-2.3, 3.2	• Understands what to communicate and to whom in a issue-resolution process • Cooperates with others as part of WHS issues-resolution activities and contributes to specific activities requiring joint responsibility and accountability • Plays an active role in group discussions, paying attention to perspectives of others when trying to reach agreement • When unable to resolve an issue, seeks advice and assistance in accordance with workplace protocols
Get the work done	1.3-1.5, 3.1, 3.3	• Plans and implements tasks to achieve required outcomes • Uses digital systems and programs to assist with planning, implementing and tracking progress • Uses formal 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS305 Contribute to WHS issue resolution	BSBWHS305A Contribute to WHS issue resolution	Updated to meet Standards for Training Packages Minor edits to clarify intent of performance criteria	Equivalent unit

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Links

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Assessment Requirements for BSBWHS305 Contribute to WHS issue resolution

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:

- prepare to contribute to work health and safety (WHS) issue resolution including:
  - identifying relevant Acts, regulations, codes of practice and workplace policies and procedures
  - identifying possible participants and their roles and responsibilities
  - recording WHS issues
  - communicating WHS issues with participants
  - providing advice and support to others about issue resolution tools, techniques and strategies
  - identifying and responding to other preparations that might be needed
- progress the WHS issue resolution process by:
  - communicating effectively to make a contribution
  - supporting and advising others to contribute according to workplace procedures and processes
  - contacting external participants when appropriate to help resolve of issues
- disseminate the results of the WHS issue resolution using appropriate methods and formats
- contribute to keeping records of WHS issue resolution and outcomes.

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 sources of WHS information and data, and how to access them

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- explain the legislative requirements for WHS issue resolution, information provision, data collection, consultation and reporting
- identify organisational policies and procedures for WHS agreements and issue resolution
- list and describe roles and responsibilities of individuals and parties under WHS legislation
- describe types of issue resolution tools, techniques and strategies.

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:

- organisational policies, standard operating procedures, procedures and plans
- relevant Acts, regulations, codes of practice, licensing requirements and standards
- office equipment and resources
- interaction with others
- 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

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BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package release 1.0

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.

It applies to individuals with supervisory responsibilities for implementing and monitoring the organisation's WHS policies, procedures and programs in a work area. These individuals have a broad knowledge of WHS policies and contribute well developed skills in creating solutions to unpredictable 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.

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
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1. Provide information to the work team about WHS policies and procedures	1.1 Accurately explain to the work team relevant provisions of WHS Acts, regulations and codes of practice 1.2 Provide information about the organisation's WHS policies, procedures and programs, and ensure it is readily accessible to, and understandable by the work team 1.3 Regularly provide and clearly explain to the work team information about identified hazards and the outcomes of risk assessment and control
2. Implement and monitor participation arrangements for managing WHS	2.1 Communicate to workplace parties the importance of effective consultation mechanisms in managing health and safety risks in the workplace 2.2 Apply consultation procedures to facilitate participation of the work team in managing work area hazards 2.3 Promptly deal with issues raised through consultation, according to organisational consultation procedures and WHS legislative and regulatory requirements 2.4 Promptly record and communicate to the work team the outcomes of consultation over WHS issues
3. Implement and monitor organisational procedures for providing WHS training	3.1 Identify WHS training needs according to organisational requirements and WHS legislative and regulatory requirements 3.2 Make arrangements to meet WHS training needs of team members in consultation with relevant individuals 3.3 Provide workplace learning opportunities and coaching and mentoring assistance to facilitate team and individual achievement of identified WHS training needs 3.4 Identify and report to management the costs associated with providing training for work team, for inclusion in financial and management plans
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 WHS policies and procedures and WHS legislative and regulatory requirements 4.2 Promptly action team member hazard reports according to organisational procedures and WHS legislative and regulatory requirements 4.3 Implement procedures to control risks using the hierarchy of control, according to organisational and WHS legislative requirements

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ELEMENT	PERFORMANCE CRITERIA
	4.4 Identify and report inadequacies in existing risk controls according to hierarchy of control and WHS legislative requirements 4.5 Monitor outcomes of reports on inadequacies, where appropriate, to ensure a prompt organisational response
5. Implement and monitor organisational procedures for maintaining WHS records for the team	5.1 Accurately complete and maintain WHS records of incidents of occupational injury and disease in work area, according to WHS policies, procedures and legislative requirements 5.2 Use aggregate information and data from work area records to identify hazards and monitor risk control procedures in work area

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, 5.2	• Interprets and analyses complex WHS legislative and organisational texts
Writing	1.1-1.3, 2.3, 2.4, 3.1, 3.2, 3.4, 4.1, 4.4, 5.1	• Documents WHS legislative and organisational information 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	1.1-1.3, 2.1, 2.4, 3.2, 3.3, 4.1, 4.4	• Provides WHS legislative and organisational information and advice using structure and language suitable for audience
Numeracy	3.4, 5.2	• Extracts, interprets and comprehends mathematical information in relation to training costs and risk management data
Navigate the world of work	1.1,1.2, 2.3, 3.1, 4.1-4.5, 5.1	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures in relation to WHS • Keeps up to date on changes to WHS legislation or regulations and organisational policies and procedures
Interact with	2.2, 3.2, 3.3	• Selects and uses appropriate conventions and protocols to facilitate consultation or provide feedback

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others		• Initiates and contributes to facilitating consultative role, responding, explaining, clarifying and expanding on ideas and information as required • Collaborates with others to achieve individual and team outcomes
Get the work done	2.2, 3.2, 3.3, 4.1-4.5, 5.1	• Uses combination of formal, logical planning and intuitive understanding of context to identify relevant information and risks, and identify and evaluate alternative strategies • Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Recognises and takes responsibility for reporting WHS risk control inadequacies • Uses formal and informal processes to monitor implementations of WHS solutions and reflect on outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements	BSBWHS401A Implement and monitor WHS policies, procedures and programs to meet legislative requirements	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements

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:

- explain clearly and accurately to work team the relevant work health and safety (WHS) information including:
  - WHS legislative and organisational requirements
  - identified hazards and outcomes of risk assessment and control
- ensure that the team has access to information about WHS policies, procedures and programs in appropriate structure and language
- implement and monitor procedures according to organisational and legislative WHS requirements including:
  - consultation and communications to enable team members to participate in managing WHS risks and hazards
  - identifying WHS training needs and providing learning opportunities, coaching and mentoring as appropriate to needs
  - identifying, reporting and taking action on WHS hazards and risks
  - identifying and reporting inadequacies in existing risk controls and monitoring outcomes to ensure a prompt organisational response
  - reporting on the cost of WHS training
  - keeping WHS records
  - analysing aggregate WHS data to identify hazards and monitor risk control procedures in work area.

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

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Knowledge Evidence

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

- outline the legal responsibilities and duties of managers, supervisors, persons conducting businesses or undertakings (PCBUs) and workers in relation to WHS risk management in the workplace
- identify key provisions of relevant WHS Acts, regulations and codes of practice that apply to the business and outline how they apply in the work area
- explain organisational policies and procedures relating to hazard identification, risk management, fire, emergency and evacuation, incident investigation and reporting
- explain the importance of effective consultation mechanisms in managing health and safety risks in the workplace
- explain how the hierarchy of control applies in the work area.

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:

- an actual workplace or simulated environment
- workplace equipment and resources
- examples of documents relating to workplace safety, hazard identification and risk assessment
- 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

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BSBWHS402 Assist with compliance with WHS laws

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 assist with providing advice about the legislative duties, rights and obligations of individuals and parties prescribed in work health and safety (WHS) legislation. It includes identification of WHS legislation, duties, rights and obligations and the necessary actions to ensure compliance in the workplace.

This unit applies to individuals who assist with providing advice about the legislative duties, rights and obligations of individuals and parties prescribed in WHS laws as part of a systematic approach to managing WHS. This unit applies to people who work in a broad range of WHS roles across all industries.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Assist with determining the legal framework for WHS in the workplace	1.1 Access current WHS legislation and related documentation relevant to the organisation's operations 1.2 Use knowledge of the relationship between WHS Acts, regulations, codes of practice, standards and guidance material to assist with determining legal requirements in the workplace 1.3 Assist with identifying and confirming the duties, rights and obligations of individuals and parties as specified in legislation 1.4 Assist with seeking advice from legal advisers where necessary
2 Assist with providing advice on WHS compliance	2.1 Assist with providing advice to individuals and parties about their legal duties, rights and obligations, and the location of relevant information in WHS legislation 2.2 Assist with providing advice to individuals and parties about the functions and powers of the WHS regulator and how they are exercised, and the objectives and principles underpinning WHS
3 Assist with WHS legislation compliance measures	3.1 Assist with assessing how the workplace complies with relevant WHS legislation 3.2 Assist with determining the WHS training needs of individuals and parties, and with providing training to meet legal and other requirements 3.3 Assist with developing and implementing changes to workplace policies, procedures, processes and systems that will achieve compliance

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, 2.2, 3.3	• Interprets and analyses complex WHS legislative and organisational texts
Writing	1.4, 2.1, 3.3	• Documents WHS legislative and organisational advice using structure, layout and language suitable for audience • Drafts, documents and updates policies, procedures or processes according to requirements

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		• Uses appropriate vocabulary and register to seek legal advice
Oral communication	1.2-1.4, 2.1, 2.2, 3.1-3.3	• 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	1.2, 1.3, 2.1, 2.2	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures in relation to WHS role and responsibilities • Keeps up to date on changes to WHS legislation and regulations, and organisational policies and procedures
Interact with others	1.2, 1.3, 1.4, 2.1, 2.2, 3.1, 3.2, 3.3	• Understands what to communicate, with whom and how, in the context of seeking WHS legal advice • 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	3.1-3.3	• Uses combination of formal, logical planning and intuitive understanding of context to identify relevant information and risks, and identify and evaluate alternative strategies in relation to WHS compliance • Uses formal decision making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria in relation to WHS compliance and training needs identification • Contributes to the design of new approaches in relation to WHS compliance

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.

Current WHS legislation and related documentation must include:	• current applicable Commonwealth and state or territory WHS Acts, regulations and codes of practice • organisational WHS policies, procedures, processes and systems • standards, guidance publications and alerts issued by the relevant WHS regulator.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS402 Assist with compliance with WHS laws	BSBWHS402A Assist with compliance with WHS laws	Updated to meet Standards for Training Packages Edits to clarify intent of Performance Criteria Strengthened Assessment Conditions. Assessors of this unit of competency must hold a WHS qualification or equivalent at Diploma level or higher	Equivalent unit

Links

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

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Assessment Requirements for BSBWHS402 Assist with compliance with WHS laws

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 assist with:

- determining current work health and safety (WHS) legal requirements for the workplace
- providing advice to parties and individuals about current WHS legal requirements for the workplace, including underpinning principles, legal duties, rights and obligations and WHS regulator functions and powers
- assessing workplace compliance with WHS legislative requirements
- determining the training needs of individuals and parties in relation to WHS requirements
- developing and implementing workplace changes in order to achieve WHS legal compliance.

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 the duties, rights and obligations of individuals and parties as specified in relevant WHS legislation, and specify the location of relevant information on WHS legislation
- describe the functions and powers of the relevant WHS regulator and how they are exercised
- identify internal and external sources of WHS information, and how to access them
- outline the objectives and principles underpinning WHS legislation
- specify method/s used for:
  - assessing WHS compliance
  - determining training needs in relation to WHS compliance
  - implementing changes to achieve WHS compliance.

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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:

- relevant Acts, regulations, codes of practice, standards and guidance material
- relevant workplace documentation
- reports from individuals and parties consulted in ensuring WHS compliance
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements. In addition, assessors for this unit of competency must hold a WHS qualification or equivalent at Diploma level or higher.

Links

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

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BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes

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 contribute to setting up, running and improving work health and safety (WHS) consultation and participation processes that are prescribed in legislation. It also covers contributing to communicating relevant information identifying and delivering related training and improving the consultation and participation processes.

This unit applies to individuals whose job role includes contributing to implementing and maintaining WHS consultation and participation processes in their work area and job role.

This unit applies to people who work in a broad range of WHS roles across all industries.

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

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ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Identify individuals and parties involved in WHS consultation and participation processes	1.1 Apply knowledge of relevant parts of WHS Acts, regulations, codes of practice, policies and procedures to identify individuals and parties with roles, duties, rights and responsibilities regarding WHS consultation and participation 1.2 Identify what these roles, duties, rights and responsibilities are and, in line with own job role and work area, communicate this information to individuals and parties 1.3 Identify roles, duties, rights and responsibilities as they apply to own job role and work area
2 Contribute to WHS consultation and participation processes	2.1 Identify workplace WHS consultation and participation processes 2.2 Contribute to setting up and running these processes as appropriate to own job role and work area 2.3 Communicate to individuals and parties what these processes are and promote and support the participation of individuals and parties as appropriate to own job role and work area
3 Contribute to processes for communicating and sharing WHS information and data	3.1 Identify consultation and participation processes for communicating and sharing WHS information and data 3.2 Contribute to and participate in these processes, as appropriate to own job role and work area
4 Contribute to identifying and meeting training requirements for effective WHS consultation and participation	4.1 Identify training requirements for individuals and parties necessary for effective WHS consultation and participation 4.2 Contribute to the delivery of required training as appropriate to own job role and work area
5 Contribute to improving WHS consultation and participation processes	5.1 Contribute to the identification and assessment of barriers to the implementation and effectiveness of WHS consultation and participation processes 5.2 Contribute to the development, implementation and evaluation of measures to remove these barriers

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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, 4.1	• Interprets and analyses complex WHS legislative and organisational texts
Writing	1.2, 2.2, 2.3, 4.1, 4.2, 5.1, 5.2	• Uses structure, layout and language suitable for audience to draft and document WHS legislative and organisational information • Records required WHS information using appropriate organisational formats
Oral communication	1.2, 2.2, 2.3	• Uses structure and language suitable for audience to provide WHS legislative and organisational information • Uses questioning and active listening to identify and discuss training requirements and barriers to WHS consultation processes
Navigate the world of work	1.1-1.3	• Takes responsibility for adherence to legal and regulatory responsibilities in relation to WHS role and responsibilities • Keeps up to date on changes to WHS legislation or regulations
Interact with others	2.2, 2.3, 3.1, 3.2, 4.2, 5.1, 5.2	• Understands what to communicate, with whom and how in 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	2.1, 2.2, 3.1, 4.1, 5.1, 5.2	• Applies formal processes when organising consultation processes, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others • Implements actions as per plans, making slight adjustments as necessary and addressing some unexpected issues

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		• Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Uses formal and informal processes to monitor implementation of measures and reflect on outcomes • Uses familiar digital systems and tools to access, organise, analyse and present information

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Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes	BSBWHS403A Contribute to implementing and maintaining WHS consultation and participation processes	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

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Assessment Requirements for BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes

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:

- explain clearly and accurately to individuals and parties the legal roles, duties, rights and responsibilities of self and others regarding work health and safety (WHS) consultation and participation processes
- contribute, as appropriate to job role and work area, to:
  - setting up and running WHS consultation and participation processes to ensure that relevant individuals and parties understand and can participate in the processes
  - identifying training needs to support the WHS consultation and participation processes and providing learning opportunities, coaching and mentoring as appropriate to needs
  - communicating information and data about WHS consultation and participation processes
  - identifying barriers to effective WHS consultation and participation and developing, implementing and evaluating measures to remove the barriers.

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 requirements under WHS legislation and organisational policies and procedures for consultation and participation processes and the individuals and parties who need to participate
- describe possible barriers to the implementation and effectiveness of WHS consultation and participation processes and strategies to remove them
- identify internal and external sources of WHS information and data and how to access them

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- describe training requirements for individuals and parties necessary for effective WHS consultation and participation processes

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 Acts, regulations, codes of practice, standards and guidelines
- workplace documentation and personnel.

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

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BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control

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 contribute to the processes of identifying work health and safety (WHS) hazards, assessing WHS risks, and developing, implementing and evaluating risk controls according to legislative and organisational requirements.

It applies to individuals who contribute to WHS risk management processes in their work role in a range of industry and workplace 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, 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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Access information to	1.1 Identify sources of information and data

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ELEMENT	PERFORMANCE CRITERIA
identify hazards and assess and control risks	1.2 Obtain information and data to determine the nature and scope of workplace hazards, the range of harms they may cause and how these harms are caused 1.3 Obtain information and data to determine the nature and scope of workplace risks and risk controls
2 Contribute to compliance and workplace requirements	2.1 Contribute to identifying and complying with requirements of workplace policies, procedures, processes and systems for hazard identification, risk assessment and risk control activities 2.2 Contribute to identifying and complying with requirements of WHS Acts, regulations, codes of practice and guidelines for hazard identification, risk assessment and risk control activities 2.3 Identify duty holders and their range of duties
3 Contribute to workplace hazard identification	3.1 Use knowledge of hazards to advise individuals and parties of workplace hazards, the harms they may cause and how these harms are caused 3.2 Apply knowledge of hazard identification to contribute to selecting techniques, tools and processes to identify workplace hazards 3.3 Contribute to applying selected techniques, tools and processes 3.4 Contribute to documenting hazard identification process and results
4 Contribute to WHS risk assessment	4.1 Apply knowledge of risk assessment to contribute to selecting techniques, tools and processes for risk assessment of hazards 4.2 Contribute to applying techniques, tools and processes to identified hazards 4.3 Contribute to documenting the results of risk assessments
5 Contribute to the development, implementation and evaluation of risk control	5.1 Apply knowledge of risk control to contribute to developing risk control options for identified hazards, using the results of risk assessments 5.2 Contribute to developing and implementing a risk control plan 5.3 Contribute to evaluating implemented risk controls

Foundation Skills

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

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Skill	**Performance Criteria**	**Description**
Reading	1.1, 1.2, 1.3, 2.1, 2.3, 3.2, 3.4, 4.1, 5.1, 5.2	• Locates, interprets and analyses complex WHS legislative and organisational texts
Writing	3.1, 3.4, 4.3, 5.1, 5.2, 5.3	• Uses structure, layout and language suitable for audience to document WHS risk-management processes • Uses appropriate organisational formats and industry specific vocabulary to document risk control plans
Oral communication	2.1, 2.2, 3.1, 3.3, 4.2	• Uses structure and language suitable for audience to communicate information and contribute ideas about WHS risk-management processes
Navigate the world of work	2.1, 2.2, 2.3	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures in relation to WHS risk-management processes • Keeps up to date with WHS legislation or regulations and related organisational policies and procedures
Interact with others	2.1, 2.2, 3.1, 3.3, 4.1, 4.2, 5.1, 5.2, 5.3	• Understands what to communicate, with whom and how in the context of advising on hazards and harms Cooperates with others as part of WHS risk-management processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates with others to achieve individual and team outcomes
Get the work done	2.1, 2.2, 3.2, 4.1, 5.2, 5.3	• Applies formal processes to plan, sequence and prioritise risk control tasks, showing awareness of time and resource constraints and the needs of others • Uses formal decision-making processes in risk management processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Applies formal problem-solving processes, identifying and evaluating several options for action • Uses formal and informal processes to monitor and reflect on outcomes of decisions

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control	BSBWHS404A Contribute to WHS hazard identification, risk assessment and risk control	Updated to meet Standards for Training Packages Minor edits to clarify Performance Criteria	Equivalent unit

Links

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

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Assessment Requirements for BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control

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 and interpret information and data about work health and safety (WHS) requirements and apply it to the selection and application of techniques, tools and processes for hazard identification, risk assessment and risk control and the development of a risk control plan
- contribute to documenting and evaluating risk management processes
- communicate about WHS requirements and compliance with a range of people
- comply with WHS requirements for hazard identification, risk assessment and risk control activities
- identify WHS duty holders and their 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:

- outline the WHS risk management (hazard identification, risk assessment and risk control) requirements specified in:
  - relevant WHS Acts and regulations
  - organisational WHS policies, procedures, processes and systems
- explain the difference between hazards and risks in the work context
- outline a range of common workplace hazards, the harms they may cause and how these harms are caused
- explain how risk assessment and controls can eliminate or minimise risks
- identify internal and external sources of WHS information and data and how to access them.

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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 legislation, standards and guidelines
- relevant policies, procedures, processes and systems
- 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

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BSBWHS405 Contribute to implementing and maintaining 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 contribute to the implementation and maintenance of a Work Health and Safety management system (WHSMS) as it applies to own work area and job role.

It applies to individuals with responsibilities for contributing to an organisation's WHSMS as part of their work health and safety (WHS) responsibilities in a range of industry and workplace 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Contribute to	1.1 Apply knowledge of the elements of WHS policy to contribute

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ELEMENT	PERFORMANCE CRITERIA
developing and promoting WHS policy	to the development and promotion of the policy as appropriate to own job role and work area 1.2 Seek the contribution and support of others in the development and promotion of WHS policy as appropriate to own job role and work area 1.3 Apply WHS policy to own and others' job roles and work areas, and communicate and explain this to others
2 Contribute to WHSMS planning	2.1 Apply knowledge of WHS legislation to identify duty holders relevant to own job role and work area 2.2 Apply knowledge of the elements of a plan to contribute to planning as it applies to own job role and work area 2.3 Facilitate integration of return-to-work and injury management procedures into the WHSMS plan 2.4 Communicate and explain the planning process to others and facilitate their contributions to the plan
3 Contribute to implementing the WHSMS plan	3.1 Implement the plan as it applies to own job role and work area 3.2 Communicate and explain the plan to others in relation to their roles and responsibilities as specified in the plan 3.3 Facilitate the contribution of others to implementing the plan
4 Contribute to evaluating WHS performance	4.1 Apply knowledge of elements of WHS performance evaluation processes and methods to contribute to evaluation as it applies to own job role and work area 4.2 Communicate and explain evaluation of WHS performance to others and facilitate their contribution
5 Contribute to reviewing and improving the WHSMS	5.1 Apply knowledge of elements of processes and methods to contribute to the review and improvement of WHS performance as it applies to own job role and work area 5.2 Communicate and explain review and improvement of the WHSMS to others and facilitate their contribution

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

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	Criteria	
Reading	1.1, 2.1, 2.3, 4.1	• Interprets and analyses complex WHS legislative and organisational texts
Writing	1.1, 1.2, 1.3, 2.3, 2.4, 3.2, 4.2, 5.2	• Uses structure, layout and language suitable for audience to document development of WHS policy and WHSMS plan • Develops required documentation using appropriate organisational formats and industry specific vocabulary
Oral communication	1.1, 1.2, 1.3, 2.3, 2.4, 3.2, 4.2, 5.2	• Presents information and advice about WHS policy using language, structure and register appropriate to audience • Asks questions and listens closely to gather required information
Navigate the world of work	1.1-1.3, 2.1	• Takes responsibility for 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 legislation and regulations and organisational policies and procedures
Interact with others	1.1, 1.2, 1.3, 2.2, 2.4, 3.2, 3.3, 4.2, 5.1, 5.2	• Understands what to communicate, with whom and how in 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	3.1, 4.1, 5.1	• Applies formal processes to plan, sequence and prioritise tasks and workload showing awareness of time and resource constraints and needs of others • Uses digital systems and programs to assist with planning, implementing and tracking progress and communicating • Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Applies formal problem-solving processes, identifying and evaluating several options for action

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS405 Contribute to implementing and maintaining WHS management systems	BSBWHS405A Contribute to implementing and maintaining 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

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Assessment Requirements for BSBWHS405 Contribute to implementing and maintaining 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 contribute, as appropriate to own job role and work area, to:

- developing work health and safety (WHS) policy
- planning the Work Health and Safety management system (WHSMS) to incorporate return-to-work and injury management procedures and other elements relevant to the work area
- communicating and explaining WHS policy and the WHSMS to others to facilitate their contribution in developing, implementing and evaluating the systems
- implementing the plan
- evaluating WHS performance and communicating the outcomes
- reviewing and improving the WHSMS.

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 the elements of the organisation's WHSMS with reference to the relevant commonwealth and state or territory WHS Acts, regulations, codes of practice and standards.
- identify regulatory authority WHSMS tools, standards and guidance material and explain how they apply to the work area
- explain the importance of effective return-to-work and injury management in a WHSMS
- identify limitations of a WHSMS, problems with WHSMS implementation and possible negative effects on WHS
- outline organisational WHS policies, procedures, processes and systems and how they apply to the work area.

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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 Acts, regulations, codes of practice, standards and guidelines
- workplace WHS policies and procedures.

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

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BSBWHS406 Assist with responding to incidents

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 assist with actions and activities performed in response to work health and safety (WHS) incidents which includes accidents.

It applies to individuals who work under supervision and use some discretion and judgement to respond to incidents within their level of responsibility.

The unit applies to people who work in a broad range of WHS roles across all industries.

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.

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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Assist with identifying legislative and other requirements	1.1 Apply knowledge of work health and safety (WHS) legislation to identify duty holders and legislative requirements regarding responding to incidents 1.2 Apply knowledge of workplace policies, procedures and processes to identify workplace requirements regarding responding to incidents 1.3 Communicate requirements to individuals and parties appropriate to own job role and work area
2 Assist with implementing initial incident response procedures	2.1 Assist with providing first aid according to workplace procedures and processes, where necessary 2.2 Assist with notifying, reporting and documenting incidents according to workplace procedures and processes 2.3 Assist with meeting legislative requirements regarding incidents, where necessary
3 Assist with collecting WHS information and data relevant to an investigation	3.1 Assist with obtaining information and data from those involved using appropriate data collection techniques, about actions and events leading up to, occurring during or after, an incident 3.2 Assist with identifying and accessing sources of additional information and data related to an incident
4 Assist incident investigations	4.1 Assist investigators and provide relevant information during investigations 4.2 Use appropriate techniques when participating in workplace investigations 4.3 Review reports on incidents, injuries and illnesses 4.4 Contact responsible persons and relevant authorities when required
5 Assist in implementing recommended measures and actions arising from investigations	5.1 Communicate recommendations arising from investigations to relevant others 5.2 Assist with measures and actions appropriate to own job role and work area

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 3.2, 4.2	• Interprets and analyses complex WHS legislative texts • Analyses reports and other materials to determine required course of action
Writing	1.3, 2.2, 3.1, 4.1,4.2 4.3, 5.1	• Completes workplace records, forms and documentation using correct format, accurate spelling and grammar and industry specific terminology • Records key information for reference using register and language appropriate to audience
Oral Communication	1.3, 2.2, 3.1, 4.1, 4.2, 4.3, 5.1	• Presents information or advice using structure and language suitable for audience • Uses questioning and listening techniques to obtain feedback from others and confirm understanding
Navigate the world of work	1.1-1.3, 2.1-2.3	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures • Keeps up to date on changes to WHS legislation and regulations and organisational policies and procedures
Interact with others	1.3, 2.2, 3.1, 4.1, 4.2, 4.4, 5.1	• Understands what to communicate, with whom and how in the context of incident 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	2.1-2.3, 3.1, 3.2, 4.1-4.4, 5.2	• Applies formal processes to plan, sequence and prioritise tasks required for incident investigations showing awareness of time and resource constraints and needs of others • 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
BSBWHS406 Assist with responding to incidents	BSBWHS406A Assist with responding to	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
	incidents		

Links

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

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Assessment Requirements for BSBWHS406 Assist with responding to incidents

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, as appropriate to job role and work area, assist with:

- identifying Work Health and Safety (WHS) legislative and organisational requirements and duty holders in relation to responding to WHS incidents
- communicating relevant WHS requirements clearly and accurately to individuals and parties
- providing first aid according to workplace procedures and processes
- reporting, notifying and documenting incidents, and meeting legislative requirements
- obtaining information about incidents using appropriate data collection techniques including:
  - information about actions and events leading up to, occurring during or after, an incident from those involved
  - identifying and accessing additional data
- investigating incidents including:
  - providing information and other assistance to investigators
  - using appropriate techniques to undertake inspections, interviews, simulations and timelines of actions and events as required
  - reviewing reports on incidents, injuries and illnesses
  - contacting relevant persons and authorities as required
- communicating and implementing recommendations from investigations.

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:

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- explain hierarchy of control and considerations for choosing between different risk controls including possible inadequacies of particular risk controls
- identify internal and external sources of WHS information and data, and how to access them including, at a minimum:
  - safe work procedures
  - WHS policies and procedures
  - WHS Acts, regulations, codes of practice, industry standards and guidelines
  - workplace records of hazard and controls risk assessments and incidents
- outline the organisation's WHS policies, procedures, processes and systems relevant to own job role or work area that relate to WHS incidents and accidents including initial response and first aid, investigations and reporting
- explain own role and role of duty holders in responding to incidents.

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:

- organisational policies, standard operating procedures, procedures and plans
- relevant Acts, regulations, codes of practice, licensing requirements, standards
- relevant WHS data
- office equipment and resources
- 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

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BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs

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 assist with the management of workers' compensation claims, rehabilitation and return-to-work programs.

It applies to individuals who assist with claims management, rehabilitation and return-to-work programs.

Note that the unit does not in any way address the process of treating the worker for their injury or illness, as this is the task of health and rehabilitation professionals. Instead, the unit focuses on assisting with managing claims and ensuring that the organisation supports the worker through return-to-work programs.

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

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ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Assist with managing claims	1.1 Process workers' compensation claims according to organisational policies and procedures, and all relevant legal and workers' compensation insurance requirements 1.2 Notify rehabilitation provider according to organisational policies and procedures, and all relevant legal and workers' compensation insurance requirements 1.3 Advise claimants as to whether their claim has been accepted 1.4 Assist with the analysis of claims to identify the nature of the illness or injury and prepare reports according to organisational policies and relevant legal and insurance requirements 1.5 Estimate projected period of absence from work and, where rehabilitation assistance is required, help to ensure arrangements are made in the work team to deal with absence
2 Assist with planning for and implementing a successful rehabilitation or return-to-work program	2.1 Facilitate consultation between rehabilitation provider and treating doctor and other health professionals, as required 2.2 Facilitate consultation between rehabilitation provider, relevant managers and affected worker 2.3 Document existing skills, experience and capabilities of affected worker to assist with return-to-work planning 2.4 Assist with job redesign, reduced hours and alternative duties according to advice from health and rehabilitation professionals 2.5 Assist with design of a rehabilitation or return-to-work program to achieve a successful return to work 2.6 Consult with relevant managers about the return-to-work program 2.7 Determine retraining that may be required when it is not possible for the worker to return to previous duties 2.8 Assist with establishing a rehabilitation or return-to-work program in consultation with worker 2.9 Start program as soon as possible
3 Assist with monitoring and evaluating a rehabilitation or return-to-work program	3.1 Facilitate regular feedback and communication between provider, supervising manager and worker 3.2 Facilitate regular contact and support between provider and worker 3.3 Assist with identifying breaches of the return-to-work program,

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ELEMENT	PERFORMANCE CRITERIA
	notifying breaches and taking prompt remedial action according to organisational policies, procedures, and relevant legal and insurance requirements 3.4 Assist with modifying return-to-work programs where appropriate 3.5 Assist with evaluating each rehabilitation or return-to-work program and implementing recommendations for system improvement 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	1.1, 1.4	• Interprets and analyses complex legal and organisational texts relating to workers' compensation, rehabilitation and return-to-work
Writing	1.2, 1.3, 1.4, 2.3	• Produces information, reports and records using structure, language and layout appropriate to audience and organisational requirements
Oral communication	2.1, 2.2, 2.6, 2.8, 3.1, 3.2	• Seeks or provides information about claims using language and features suitable for audience and context
Numeracy	1.5	• Performs calculations necessary to provide estimates related to timeframes
Navigate the world of work	1.1, 1.2, 1.4, 3.3	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures in relation to role and responsibilities • Keeps up to date on changes to legislation or regulations and organisational policies and procedures
Interact with others	1.5, 2.1, 2.2, 2.4, 2.5, 2.6, 2.8, 3.1, 3.2	• Understands what to communicate, with whom and how in context of 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
Get the work	1.4, 1.5, 2.4, 2.7,	• Plans tasks with logically sequenced steps, reflecting

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done	2.8, 2.9, 3.4, 3.5	awareness of time and resource constraints and needs of others • Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Monitors progress of tasks in order to provide timely information to claimants and modify plans as necessary • Evaluates outcomes with a view to implementing improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs	BSBWHS407A Assist with claims management, rehabilitation and return-to-work programs	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

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Assessment Requirements for BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs

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 within legislative and insurance requirements and organisational policies and procedures to:

- assist with processing and analysing workers' compensation claims including:
  - identifying and reporting on the nature of injury
  - estimating period of absence from work
  - ensuring arrangements are made in the work team to deal with absence as needed
- assist with planning, implementation of a rehabilitation or return-to-work program including:
  - job redesign, reduced hours and alternative duties as appropriate
  - documenting existing skills, experience and capabilities of affected worker
  - assisting with design of a rehabilitation or return-to-work program and determining retraining requirements
  - consulting with relevant mangers about the program
- assist with monitoring and evaluating a rehabilitation or return-to-work program including:
  - facilitating regular contact, feedback and communications between provider, supervising manager and worker
  - identifying and notifying breaches of the return-to-work program and taking prompt remedial action
  - modifying the program where appropriate
  - evaluating the program and implementing recommendations for system improvement where appropriate
- communicate and facilitate consultation and negotiations sensitively with affected worker, relevant managers and external providers to address issues around compensation, treatment, rehabilitation, return-to-work matters and the effectiveness of a program.

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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 organisation's rehabilitation and return-to-work programs
- outline relevant legislation and insurance requirements
- summarise the rights and obligations of all parties for rehabilitation and return-to-work programs under the relevant workers' compensation scheme and relevant legislation
- outline methods, techniques and tools to support the affected worker including:
  - different rehabilitation options and providers
  - options for alternative duties
  - processes and procedures preparing a workplace for return-to-work.

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 documentation and WHS data
- relevant Acts, regulations, codes of practice, licensing requirements, standards
- office equipment and resources
- 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

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BSBWHS408 Assist with effective WHS management of contractors

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 assist with the work health and safety (WHS) management of contractors. The WHS management of contractors has a strong focus on compliance with WHS organisational and legislative requirements.

This unit applies to individuals who either work in organisations that are supplied with services by contractors or work in organisations that supply such services. It is only concerned with the supply of on-site services to workplaces. It does not cover outworkers or contractors who supply goods, materials or products to workplaces.

The unit applies to people who work in a broad range of WHS roles across all industries.

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

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ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Assist with identifying existing contractor WHS arrangements	1.1 Apply knowledge of workplace to identify services supplied by contractors 1.2 Access contracts and other relevant contract documentation, information and data 1.3 Identify content relevant to contractor WHS arrangements 1.4 Assist with identifying workplace policies, procedures, processes, systems, practices and activities relevant to contractor WHS arrangements
2 Assist with evaluating contractor WHS arrangements and making improvements as required	2.1 Apply knowledge of WHS legislation to assist with determining if contracts and workplace policies, procedures, processes, systems, practices and activities comply with WHS legislative requirements 2.2 Apply knowledge of best practice and workplace WHS information and data to assist with evaluating effectiveness of contractor WHS arrangements 2.3 Assist with identifying areas of contractor WHS arrangements needing improvement 2.4 Assist with developing, implementing and evaluating improvements to contractor WHS arrangements

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	• Interprets and analyses complex legal and organisational texts relevant to contractor WHS arrangements
Writing	2.1-2.4	• Uses structure, layout and language suitable for a range of audiences when preparing evaluation reports and other communications
Oral communication	1.4, 2.1-2.4	• Uses language suitable for audience to present information, offer opinions or provide advice about WHS contractor arrangements

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Navigate the world of work	1.4, 2.1, 2.2	• Takes responsibility for adherence to legal and regulatory responsibilities and organisational policies and procedures • Keeps up to date on changes to legislation or regulations and organisational policies and procedures
Interact with others	1.4, 2.1, 2.2, 2.3, 2.4	• Cooperates with others as part of contractor WHS arrangement processes, and contributes to specific activities requiring joint responsibility and accountability • Understands what to communicate, with whom and how
Get the work done	2.1, 2.2, 2.3, 2.4	• With assistance, determines priorities and sequences the steps in clearly defined tasks and identifies and assembles the resources required • Uses formal decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS408 Assist with effective WHS management of contractors	BSBWHS408A Assist with effective WHS management of contractors	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

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Assessment Requirements for BSBWHS408 Assist with effective WHS management of contractors

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:

- assist with identifying existing contractor 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
- access contracts for the identified services including formal contracts to supply services, documents related to the contracts and any undocumented understandings and agreements
- assist in identifying contractor work health and safety (WHS) arrangements including actual contractor work processes, procedures and activities and organisational policies, procedures and systems
- assist with evaluating contractor WHS arrangements for compliance and effectiveness in terms of:
  - WHS legislative requirements
  - best practice
  - workplace WHS information and data
- assist with identifying areas of contractor WHS arrangements that need improvement and in developing, implementing and evaluating 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:

- describe the nature and range of the contexts, situations and arrangements where contractor services are supplied to the organisation

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- outline contractor WHS arrangements with reference to the relevant commonwealth and state or territory WHS Acts, regulations, codes of practice and standards outline organisational WHS policies, procedures, processes and systems that are relevant to contractor services
- list the duties, rights and obligations of individuals and parties as specified in relevant WHS legislation with regard to the supply of services to workplaces by contractors
- detail best practice in WHS management of contractors with regard to policies, procedures, processes, systems, methods and arrangements
- identify internal and external sources of information and data that are relevant to contractor WHS arrangements and how to access them.

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:

- relevant Acts, regulations, codes of practice, licensing requirements, standards
- relevant WHS data
- office equipment and resources
- 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

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BSBWHS409 Assist with workplace monitoring processes

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 assist with monitoring a range of physical agents and conditions relevant to work health and safety (WHS).

It applies to individuals working in a broad range of WHS roles across all industries who assist with using a range of measuring devices to collect, interpret, evaluate and report on workplace information and data in relation to physical agents and conditions.

It does not extend to hazard identification, risk assessment or developing control measures based on the outcomes of monitoring, which are covered in BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control.

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
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	**PERFORMANCE CRITERIA**
essential outcomes.	*demonstrate achievement of the element.*
1 Assist with selecting measuring devices	1.1 Assist with identifying regulatory requirements and standards that apply to monitoring 1.2 Identify agent and/or condition to be measured through consultation with relevant individuals and parties 1.3 Identify characteristics of agent and/or condition 1.4 Determine the area where measurements are to be taken 1.5 Assist with identifying types of appropriate measuring equipment 1.6 Assist with the selection of measuring equipment according to the agent and/or condition, the environment, the activities being carried out and the level of risk to self 1.7 Recognise limits of own expertise and available equipment and seek expert advice and equipment as required
2 Assist with preparations to collect workplace information and data	2.1 Determine a sampling process 2.2 Consult with and advise those involved in workplace activities to collect information and data about the requirements, nature and purpose of the monitoring 2.3 Assist with defining a sampling plan after inspecting area and consulting with workers and affected parties about the nature of the problem 2.4 Assist with checking the operability of equipment
3 Assist with collecting workplace information and data	3.1 Assist with selecting and calibrating monitoring equipment, and selecting appropriate scale 3.2 Assist with tests 3.3 Assist with correct use and maintenance of equipment to collect information and data 3.4 Ensure own health and safety while collecting information and data, and record readings using expert support and advice as required 3.5 Assist with dismantling and cleaning equipment and parts, or dispose of appropriately 3.6 Assist with correctly storing equipment or making it ready for re-use as required
4 Assist with documenting and evaluating results of	4.1 Assist with interpreting and evaluating results against a recognised standard and documenting results

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ELEMENT	PERFORMANCE CRITERIA
monitoring	4.2 Assist with preparing reports on the monitoring process, including any regulatory requirements, and consider purposes of report and the target audiences 4.3 Assist with presenting required information and data clearly and logically 4.4 Assist with retaining results and records in a format that enables them to be readily retrieved according to regulatory requirements and standards

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	• Interprets and analyses complex legal organisational and technical texts relevant to monitoring
Writing	1.2, 4.2, 4.3, 4.4	• Uses appropriate structure, layout and language for reporting and recording information about WHS monitoring
Oral communication	1.2, 1.7, 2.2, 2.3, 3.4	• Uses structure and language suitable for audience to present or seek information about monitoring
Numeracy	3.1, 3.2, 3.3, 4.1, 4.3	• Selects and flexibly uses a range of tools, hand-held devices, computers and technological processes to perform calculations • Collects, represents, summarises and interprets a range of statistical data appropriately • Uses a range of informal and formal oral and written mathematical language and symbols to communicate mathematically
Navigate the world of work	1.1, 4.1, 4.2	• Takes responsibility for adherence to legal and regulatory responsibilities in relation to WHS role and responsibilities • Keeps up to date on changes to WHS legislation or regulations
Interact with others	1.1,1.2, 1.7, 2.2, 2.3, 3.2, 3.3, 3.4, 3.5,	• Understands what to communicate, with whom and how in context of WHS monitoring • Cooperates with others as part of WHS monitoring

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	3.6, 4.2, 4.3, 4.4	processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates with others to achieve individual and team outcomes • Offers assistance and shares information and resources voluntarily
Get the work done	1.4, 1.5, 1.6, 1.7, 2.1, 2.3, 2.4, 3.1, 4.1, 4.2, 4.3, 4.4	• With assistance, determines priorities and sequences the steps in clearly defined tasks and identifies and assembles the resources required in relation to planning for WHS monitoring • Uses formal decision making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria • Uses familiar digital systems and tools to access, organise, analyse and display information relevant to role • Manages and maintains files securely in appropriate storage media and formats to enable retrieval according to regulations and standards

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS409 Assist with workplace monitoring processes	BSBWHS409A Assist with workplace monitoring processes	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

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Assessment Requirements for BSBWHS409 Assist with workplace monitoring processes

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 assist with processes for monitoring physical agents and/or conditions including:

- identifying regulatory requirements and standards that apply to monitoring of physical agents and/or conditions relevant to work health and safety (WHS)
- identifying the context of measurements to be undertaken including:
  - which physical agents and/or conditions will be measured and their characteristics
  - where the 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
  - physical features of equipment, such as emitting sources
- preparing for and collecting workplace WHS data and information including:
  - selecting and calibrating appropriate equipment and selecting appropriate scale
  - defining a sampling process and plan
  - performing tests
  - correct preparation, use, maintenance, cleaning storage and if required disposal of equipment
- consultation and communication with individuals and parties about the requirements, purpose and nature of the monitoring
- interpreting and evaluating results of monitoring including calculations using appropriate units of measurement, logarithmic scales, decimals and order of magnitude relevant to making and interpreting measurements and measurement error
- preparing and presenting clear and logical reports that are appropriate to purpose of report and the target audience
- keeping records that meet regulatory requirements
- seek expert advice, support and equipment as required.
- ensure own safety during monitoring process.

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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:

- list 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
- outline aspects of WHS Acts, regulations, codes of practice and standards that are relevant to measuring physical agents and/or conditions and how they apply to the organisation
- explain the mode of action of common physical, biological and chemical agents on the body and how they produce discomfort or harm
- list the characteristics, mode of action and units of measurement for major hazard types
- describe environmental conditions that impact on measurements
- explain types of measuring and monitoring equipment and techniques for correct and safe use including limitations on use and output, calibration, adjustment, maintenance and any in-built alarms.

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:

- measuring devices and equipment
- office equipment and resources
- relevant Acts, regulations, codes of practice, licensing requirements, standards
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBWHS410 Contribute to work-related health and safety measures and initiatives

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 the identification, review, development, implementation and evaluation of effective participation and consultation processes as an integral part of managing work health and safety (WHS).

It applies to individuals with responsibility for enabling people to be consulted about, and to participate in, WHS management and decision making across the organisation. 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Contribute to scoping work-related health and safety measures and initiatives	1.1 Access sources of information and data on work-related health and safety measures and initiatives that address specific legislative requirements and obligations, and those that support non-statutory health promotion programs 1.2 Differentiate between these two types of measures and initiatives and communicate findings to individuals and parties 1.3 Identify measures and initiatives that address statutory obligations and those that support non-statutory programs 1.4. Consult with individuals and parties to assist with identifying and evaluating factors impacting on work-related health and safety 1.5. Consult with individuals and parties to assist with determining appropriate measures and initiatives to address impacting factors 1.6 Consult with individuals and parties to assist with designing measures and initiatives that either meet specific legislative requirements and obligations or support non-statutory health promotion programs
2 Contribute to establishing work-related health and safety measures and initiatives	2.1 Contribute to the development and planning of work-related health and safety measures and initiatives 2.2 Identify resourcing requirements, timelines and responsibilities to implement work-related health and safety measures and initiatives 2.3 Assist with timetabling, liaison and coordination, administering resources and communication to implement work-related health and safety measures and initiatives
3 Contribute to ensuring work-related health and safety measures and initiatives comply with legislative requirements and obligations	3.1 Apply knowledge of WHS consultation and participation processes to help ensure effective and appropriate participation of, and consultation with individuals and parties about all aspects of work-related health and safety measures and initiatives 3.2 Apply knowledge of WHS legislation and workplace policies and processes to help ensure work-related health and safety measures and initiatives are compliant 3.3 Apply knowledge of other legislative requirements and obligations to help ensure work-related health and safety measures and initiatives are compliant
4 Contribute to reviewing and evaluating work-related health and safety measures and initiatives	4.1 Contribute to developing effective means to review and evaluate work-related health and safety measures and initiatives 4.2 Assist with review and evaluation activities 4.3 Assist with preparing reports on, and communicating review and evaluation outcomes to individuals and parties

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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	• Organises, evaluates and critiques ideas and information from a range of complex information and data texts when identifying measures and initiatives
Writing	1.2, 4.3	• Uses broad vocabulary, correct grammatical structure and conventions appropriate to audience and context to present findings or review and evaluate outcomes
Oral communication	1.2, 1.4, 1.5, 1.6	• Chooses appropriate vocabulary to communicate findings, seek information or evaluate outcomes
Navigate the world of work	1.1, 3.1, 3.2, 3.3	• Understands own legal rights and responsibilities and is extending understanding of general legal principles applicable across work contexts in relation to health and safety measures and initiatives • 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 work
Interact with others	1.4, 1.5, 1.6, 4.1	• Recognises and applies the protocols governing what to communicate, with whom and how in safety measures and initiatives contexts • 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
Get the work done	1.5, 1.6, 2.1, 2.2, 2.3, 4.1, 4.2, 4.3	• Applies formal processes when planning health and safety measures and initiatives, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others • Implements actions as per plan, making slight adjustments if necessary, and addressing some unexpected issues • Uses a formal decision-making process with support, setting or clarifying goals, gathering information, and identifying and evaluating several choices against a limited set of criteria • Contributes to the design of new approaches to safety

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		measures and initiatives within the immediate work environment • Uses common digital systems and tools to complete record-keeping tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS410 Contribute to work-related health and safety measures and initiatives	BSBWHS410A Contribute to work-related health and safety measures and initiatives	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

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Assessment Requirements for BSBWHS410 Contribute to work-related health and safety measures and initiatives

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 scoping, establishing, reviewing and evaluating work health and safety (WHS) measures and initiatives to:
  - address specific legislative requirements and obligations
  - support non-statutory health promotion programs
- contribute to ensuring work-related health and safety measures and initiatives comply with legislative requirements and obligations
- liaise with relevant people internal and external to 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 the application of relevant mandatory health monitoring, including biological monitoring, to help secure work health and safety
- explain the difference between work-related health and safety measures and initiatives designed to meet specific legislative requirements and obligations, and those designed to support non-statutory health promotion programs, and give examples of each
- list factors that impact on work-related health and safety and their potential effects
- identify internal and external sources of WHS information and data, and how to access them
- outline organisational WHS and other relevant policies, procedures, processes and systems, including human resources
- summarise relevant WHS legislation, other legislation (such as privacy and workers' compensation) and common law rights and duties specific to work-related health and safety measures and initiatives

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- describe work-related health and safety measures and initiatives that either address specific legislative requirements and obligations, or support non-statutory health prevention programs, including:
  - the factors impacting on worker health and safety that they address
  - effectiveness
  - costs and benefits
  - criteria for decisions regarding their implementation in a specific workplace
  - how they should be implemented.

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
- relevant legislation, regulations, standards and guidelines
- information and resources about factors impacting on the health and safety of workers, and work-related health and safety measures and initiatives
- relevant WHS documentation and records
- 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

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BSBWHS501 Ensure a safe workplace

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, maintain and evaluate the organisation's work health and safety (WHS) policies, procedures and programs in the relevant work area, according to WHS legislative requirements. It takes a systems approach and addresses compliance with relevant legislative requirements.

This unit applies to managers 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 legislation, for example persons conducting a business or undertaking (PCBUs) or officers, as defined by relevant legislation.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Establish a WHS management system in a work area	1.1 Locate, adapt, adopt and communicate WHS policies that clearly define the organisation's commitment to complying with WHS legislation 1.2 Identify duty holders and define WHS responsibilities for all workplace personnel in the work area according to WHS legislation, policies, procedures and programs 1.3 Identify and approve financial and human resources required by the WHS management system (WHSMS)
2 Establish and maintain effective and compliant participation arrangements for managing WHS in a work area	2.1 Work with workers and their representatives to set up and maintain participation arrangements according to relevant WHS legislation 2.2 Appropriately resolve issues raised through participation and consultation arrangements according to relevant WHS legislation 2.3 Promptly provide information about the outcomes of participation and consultation to workers and ensure it is easy for them to access and understand
3 Establish and maintain procedures for effectively identifying hazards, and assessing and controlling risks in a work area	3.1 Develop procedures for ongoing hazard identification, and assessment and control of associated risks 3.2 Include hazard identification at the planning, design and evaluation stages of any change in the workplace to ensure that new hazards are not created by the proposed changes and existing hazards are controlled 3.3 Develop and maintain procedures for selecting and implementing risk controls according to the hierarchy of control and WHS legislative requirements 3.4 Identify inadequacies in existing risk controls according to the hierarchy of control and WHS legislative requirements, and promptly provide resources to enable implementation of new measures 3.5 Identify requirements for expert WHS advice, and request this advice as required
4 Evaluate and maintain a work area WHS management system	4.1 Develop and provide a WHS induction and training program for all workers in a work area as part of the organisation's training program 4.2 Use a system for WHS record keeping 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 the decision 4.3 Measure and evaluate the WHSMS in line with the

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ELEMENT	PERFORMANCE CRITERIA
	organisation's quality systems framework 4.4 Develop and implement improvements to the WHSMS to achieve organisational WHS objectives 4.5 Ensure compliance with the WHS legislative framework to achieve, as a minimum, WHS legal requirements

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, 4.2, 4.3, 4.5	• Organises, evaluates and critiques ideas and information from WHS legislation, policies, procedures and programs
Writing	1.1, 2.3, 3.2, 3.5, 4.1, 4.2	• Produces WHS policies, procedures and programs • using appropriate vocabulary, grammatical structure and conventions to produce • Records WHS decisions according to organisational requirements
Oral communication	1.1, 2.1, 2.2, 2.3	• Presents and seeks information from others using structure and language suitable for the audience • Provides information on resolution of WHS issues varying level of technical vocabulary to suit audience
Numeracy	1.3	• Selects from, and applies, an expanding range of mathematical and problem solving strategies in identifying financial and human resources required
Navigate the world of work	1.1, 1.2, 2.1, 2.2, 3.3, 3.4, 4.5	• Monitors adherence to legal and regulatory rights and responsibilities for self and others in relation to WHS • Takes responsibility for developing, implementing and reviewing policies, procedures and processes in accordance with organisational and legislative requirements
Interact with others	1.1, 2.1, 2.3, 3.5	• Plays a lead role in situations requiring effective collaboration demonstrating the ability to guide discussions and negotiate agreeable outcomes • Provides feedback to others in forms they can

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		understand and use
Get the work done	1.1, 1.3, 2.1, 2.2, 2.3, 3.2, 3.3, 3.4, 3.5, 4.1, 4.2 4.3, 4.4, 4.5	• Develops plans or processes to manage relatively complex, WHS management tasks with an awareness of how they contribute to operational and strategic goals • Uses systematic, analytical processes, setting goals, gathering relevant information, and identifying and evaluating 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 digital systems and tools to enter, store and retrieve relevant information

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.

WHS legislation must include:	• applicable Commonwealth and state or territory WHS Acts, regulations and codes of practice.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS501 Ensure a safe workplace	BSBWHS501A Ensure a safe workplace	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

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Assessment Requirements for BSBWHS501 Ensure a safe workplace

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, implement, maintain and evaluate a work health and safety (WHS) management system for a work area of an organisation in accordance with WHS legislation including policies, procedures and record keeping
- ensure organisational WHS compliance
- establish, implement, maintain and evaluate effective and compliant participation arrangements for managing WHS including identifying duty holders, identifying and approving the required resources and 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 risk control
- provide information and complete documentation for a WHS management system
- identify requirements for and request expert WHS advice.

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 detail relevant WHS Acts, regulations and codes of practice
- specify relevant WHS organisational policies, procedures, programs and practices
- explain hazard identification and risk-management processes
- describe the hierarchy of risk control and how it is applied in the workplace
- specify in-house and WHS legislative reporting requirements.

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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:

- organisational WHS policies and procedures
- WHS legislation, regulations and codes of practice
- 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

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BSBWHS502 Manage effective WHS consultation and participation processes

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 the identification, review, development, implementation and evaluation of effective participation and consultation processes as an integral part of managing work health and safety (WHS).

It applies to individuals with responsibility for enabling people to be consulted about, and to participate in, WHS management and decision making across the organisation. 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Identify the requirements for WHS consultation and participation	1.1 Review WHS legislation to identify duty holders and legal requirements for WHS consultation and participation processes 1.2 Review organisational policies, procedures, processes and systems to identify requirements and opportunities for WHS consultation and participation 1.3 Consult with individuals and parties to identify specific requirements for WHS consultation and participation
2 Review existing WHS consultation and participation processes	2.1 Review effectiveness of existing WHS consultation and participation processes, in consultation with individuals and parties 2.2 Identify inconsistencies between existing processes and identified requirements for WHS consultation and participation processes 2.3 Consult with individuals and parties to identify specific areas for improvement in WHS consultation and participation processes
3 Develop WHS consultation and participation processes	3.1 Identify factors that may impact on the design of WHS consultation and participation processes 3.2 Design new or modify existing processes to achieve required improvements in consultation with individuals and parties 3.3 Ensure improvements integrate with existing WHS and other systems and are appropriate to the organisation 3.4 Plan how improvements will be implemented and identify resourcing requirements, roles and responsibilities, and training needs required for implementation 3.5 Develop action plans with allocated responsibilities and timelines 3.6 Determine priorities for implementation, in consultation with individuals and parties
4 Implement WHS consultation and participation arrangements	4.1 Provide advice and support to individuals and parties during implementation 4.2 Monitor and support implementation, in consultation with individuals and parties 4.3 Recommend and support changes to the plan as required
5 Monitor and evaluate WHS consultation and participation processes	5.1 Develop an evaluation protocol, in consultation with individuals and parties 5.2 Develop and implement a plan for collecting information 5.3 Analyse and evaluate information

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ELEMENT	PERFORMANCE CRITERIA
	5.4 Make recommendations for improvement based on the evaluation 5.5 Consult with individuals and parties on the outcomes of the evaluation and recommend an action plan for ongoing improvements

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, 4.2, 5.3	• Organises, evaluates and critiques ideas and information from a range of complex legal and organisational texts to identify WHS duty holders and consultation and participation requirements
Writing	2.1, 2.2, 2.3, 3.2, 3.4, 3.5, 4.3, 5.1, 5.2, 5.4, 5.5	• Employs broad vocabulary and uses grammatical structure and conventions appropriate to text in writing reports, plans and protocols • Uses appropriate vocabulary and register to seek information from others
Oral communication	1.3, 2.1, 2.3, 3.2, 3.6, 4.1, 4.2, 5.1, 5.5	• Presents ideas and information choosing appropriate vocabulary for purpose and audience • Uses questioning and active listening to seek opinions or information and to clarify understanding
Numeracy	5.2, 5.3	• Uses highly developed mathematical and problem-solving strategies and techniques in designing and using information collection and analysis processes
Navigate the world of work	1.1, 1.2	• Monitors adherence to legal and regulatory rights and responsibilities for self and others in relation to WHS consultation and participation processes
Interact with others	1.3, 2.3, 4.1, 5.1, 5.5	• Plays a lead role in situations requiring effective collaboration • Provides feedback to others in forms they can understand and use
Get the work done	2.1, 2.2, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 4.2, 4.3, 5.2, 5.3, 5.4, 5.5	• Develops plans to manage relatively complex tasks with an awareness of how they contribute to operational and strategic goals • Uses systematic, analytical processes, setting goals, gathering relevant information, and identifying and

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		evaluating 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, establishing criteria for deciding between options, seeking input and advice from others when necessary • Uses digital systems and tools for data collection and analysis and communication and reporting

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS502 Manage effective WHS consultation and participation processes	BSBWHS502A Manage effective WHS consultation and participation processes	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

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Assessment Requirements for BSBWHS502 Manage effective WHS consultation and participation processes

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:

- implement the legal and organisational requirements for work health and safety (WHS) participation and consultation
- manage effective WHS consultation and participation processes including development, implementation, monitoring and review, in consultation with others
- review the effectiveness of existing WHS participation and consultation processes, identifying gaps and areas for improvement and positive performance indicators
- develop new or improved WHS participation and consultation processes that achieve required improvements and integrate with existing systems
- develop an action plan for implementation of new or improved WHS participation and consultation processes
- provide advice, support and monitoring to others during implementation of new or improved WHS participation and consultation processes and recommending changes to the plan 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:

- identify appropriate communication networks, processes and formats
- outline Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material in general, and in particular the parts relating to:
  - duties of PCBUs, officers, workers and inspectors
  - duty holders
  - consultation, participation and representation
  - discriminatory, coercive and misleading conduct

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    - workplace entry by WHS permit holders
- describe formal and informal communication and consultation processes, and key personnel related to communication
- explain 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
- list internal and external sources of WHS information and data, and how to access them
- identify key personnel, including change agents, within workplace management structure
- describe organisational culture as it impacts on the work team
- summarise relevant organisational WHS policies, procedures, processes and systems
- describe the roles and responsibilities of individuals and parties under WHS legislation
- outline the training needs of health and safety committees, and health and safety representatives.

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
- reports from other parties consulted about design, implementation, management and review processes
- relevant Acts, regulations, codes of practice, standards and guidelines
- 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

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BSBWHS503 Contribute to the systematic management of WHS risk

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 contribute to the systematic management of work health and safety (WHS) risk.

It applies to individuals who provide specialised knowledge, systematic approaches and guidance to a range of personnel.

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.

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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Access information and data to contribute to the	1.1 Identify sources of information and data 1.2 Obtain information and data to determine the purposes,

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ELEMENT	PERFORMANCE CRITERIA
systematic management of WHS risk	objectives, principles and framework of a systematic approach to managing WHS risk
2 Contribute to effective consultation and participation during all stages of risk management	2.1 Identify individuals and parties who need to participate and be consulted 2.2 Apply knowledge of effective consultation and participation to contribute to ensuring effective consultation and participation processes occur
3 Contribute to establishing the context for risk management	3.1 Apply knowledge of WHS legislation to identify duty holders and legislative requirements for WHS risk management 3.2 Identify individuals and parties impacting on risk management 3.3 Apply knowledge of organisation to identify factors that will impact on risk control 3.4 Contribute to establishing the context of the risk management process 3.5 Contribute to defining risk criteria
4 Contribute to risk assessment	4.1 Apply knowledge of workplace hazards and risks to contribute to risk identification 4.2 Apply knowledge of WHS legislation, risk assessment and workplace WHS information and data to contribute to risk analysis and evaluation
5 Contribute to risk treatment	5.1 Apply knowledge of WHS hazard and risk control, and WHS legislation to contribute to the selection of risk treatment options 5.2 Apply knowledge of the organisation's WHS management system (WHSMS) and WHS information system (WHSIS) to prepare and implement risk treatment/s
6 Contribute to monitoring, reviewing and recording risk management process	6.1 Apply knowledge of the organisation's WHSMS to contribute to monitoring and reviewing risk management processes 6.2 Apply knowledge of the organisation's WHSIS to contribute to recording 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.

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 3.1,	• Organises, evaluates and integrates information from a range of sources to determine requirements
Writing	2.2, 3.4, 3.5, 4.2, 5.2, 6.2	• Records results of investigations using clear and comprehensible language and layout • Creates a range of formal texts using industry language appropriate to audience and environment
Oral Communication	2.2, 3.4, 3.5, 4.2	• Uses listening and questioning techniques to clarify understanding and elicit the views of others • Presents information varying level of technical vocabulary to suit audience
Numeracy	1.1, 4.1, 4.2, 6.1, 6.2	• Collates, interprets and compares numerical and statistical information relevant to requirements
Navigate the world of work	3.1, 4.2, 5.1, 5.2, 6.1, 6.2	• Considers legal and regulatory responsibilities when implementing, monitoring or reviewing risk management processes
Interact with others	2.2, 3.4, 3.5, 4.2	• Identifies and uses appropriate conventions and protocols when communicating with others • Plays a lead role in situations requiring effective collaboration skills demonstrating the ability to guide discussions and negotiate outcomes
Get the work done	1.1, 1.2, 2.1, 3.1-3.3, 4.1, 4.2, 5.1, 5.2, 6.1, 6.2	• Develops plans or processes to manage relatively complex risk management tasks, with an awareness of how they contribute to operational and strategic goals • Considers whether, and how, others should be involved, using consultative or collaborative processes as an integral part of the decision-making process • Applies problem solving processes to determine solutions to risk management issues • Uses analytical and lateral thinking to review practices and suggest improvements • Uses a range of digitally based technology and applications to access, organise and share relevant information in effective ways

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS503 Contribute to the systematic management of WHS risk	BSBWHS503A Contribute to the systematic management of WHS risk	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

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Assessment Requirements for BSBWHS503 Contribute to the systematic management of WHS risk

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, interpret and apply information from a range of sources to contribute to the development, implementation, monitoring and evaluation of a systematic approach to work health and safety (WHS) risk management
- apply WHS Acts, regulations codes of practice and standards, including the Safe Work Australia model Code of Practice: How to Manage Work Health and Safety Risks
- identify duty holders
- explain the differences between a hazard and a risk and identify hazards and risks in the organisation
- prepare an action plan to implement a systematic approach to WHS risk management
- prepare positive performance indicators for evaluation of a systematic approach to WHS risk management
- consult effectively with relevant stakeholders.

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 formal and informal communication and consultation processes, and key personnel related to communication, including duty holders
- explain how the characteristics and composition of the workforce impact on WHS risk and the management of WHS with reference to:
  - communication skills
  - cultural background/diversity
  - gender
  - labour market changes

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  - language, literacy and numeracy
  - structure and organisation of the workforce, for example part time, casual and contract workers, shift rosters, geographical location
  - workers with specific needs and limitations
  - workplace culture towards alcohol and other drug use
- describe internal and external sources of WHS information and data, and explain how to access these sources
- outline the limitations of generic hazard identification and risk assessment checklists, and risk ranking processes
- describe the nature of workplace processes including work flow, planning and control and hazards relevant to the workplace
- describe organisational behaviour and culture as it impacts on WHS, change and the work team
- describe the key features of organisational WHS policies, procedures, processes and systems
- identify other functional areas in the organisation that impact on the management of WHS
- outline the key features of relevant commonwealth and state/territory WHS Acts, regulations, codes of practice, standards and guidance material
- describe the key principles and/or practices of:
  - a systematic approach to managing WHS
  - duty of care including concepts of causation, foreseeability and prevention
  - incident causation and injury processes
- describe risk analysis and assessment techniques and tools, and their application and limitations
- explain risk, as the effect of uncertainty, on objectives
- explain the duty of persons conducting businesses or undertakings (PCBUs) in regard to risk management under WHS legislation
- describe the sources of occupational disease and their prevention
- describe standard industry controls for hazards
- describe techniques, tools and processes for identifying and controlling health and safety hazards and risks including :
  - hazard and risk checklists
  - hazard hunts
  - job safety analysis
  - manifests and registers including dangerous goods, hazardous chemicals and plant
  - safe work method statements
  - surveys using questionnaires, interviews and other survey techniques
  - workplace inspections and walk throughs
- describe the key features of the toxicology of hazardous chemicals and potential health effects in the workplace.

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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:

- relevant WHS legislation, standards, codes of practice and guidelines
- workplace policies and procedures and documentation
- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Access information and	1.1 Identify sources of information and data

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ELEMENT	PERFORMANCE CRITERIA
data on WHS hazards and risk management	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 1.3 Obtain information and data to determine techniques, tools and processes to assess risk associated with identified hazards, and identify risk control options
2 Prepare to manage WHS risks	2.1 Apply knowledge of the organisation's WHSMS and WHSIS to identify WHS risk management requirements 2.2 Apply knowledge of WHS legislation to identify duty holders and legislative requirements for WHS risk management
3 Develop and implement WHS risk-management processes	3.1 Apply techniques, tools and processes to identify hazards, assess associated risks and identify risk control options 3.2 Apply knowledge of hazards and risks to select appropriate risk controls 3.3 Develop and implement a risk control plan and evaluate risk controls 3.4 Carry out hazard identification and risk management according to organisational and legal requirements

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	• Organises, interprets evaluates and critiques ideas and information in relation to WHS risk management
Writing	3.1, 3.2, 3.3, 3.4	• 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	• Monitors adherence to legal, regulatory and organisational rights and responsibilities for self and others in relation to WHS risk management

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Interact with others	3.1, 3.2, 3.3	• 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	• 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

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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

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  - 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

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- 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

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BSBWHS505 Investigate WHS incidents

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, conduct and report on investigations of work health and safety (WHS) incidents that have resulted in, or have the potential to result in, injury or damage.

It covers conducting an initial assessment of the situation; establishing the scope and legal parameters of the investigation; conducting a systematic analysis to identify underlying causes and actions for prevention; and reporting on the outcomes of the investigation appropriate to the potential severity of the incident, which may include accessing specialist expertise.

This unit applies to individuals required to investigate incidents in relation to prevention of future incidents.

The unit applies to people who work in a range of WHS roles across all industries and who 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

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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 Ensure initial responses to the incident are carried out according to requirements	1.1 Prepare and implement a workplace procedure for **incident** investigation 1.2 Ensure site of the incident is safe and secured and that the **immediate needs** of those involved in the incident are met 1.3 Ensure **WHS legislative requirements** are met 1.4 Ensure other actions are performed to meet requirements of relevant workplace policies, procedures, processes and systems
2 Develop an investigation plan	2.1 Apply knowledge of **WHS legislation** and workplace policies, procedures and systems to assist with identifying **duty holders** and ensure requirements of WHS legislation and workplace policies, procedures, processes and systems are met by the investigation plan 2.2 Form an appropriate investigation team 2.3 Define the scope and purpose of the investigation and ensure they are appropriate to the scope and nature of the incident 2.4 Ensure participation of, and consultation with **individuals and parties** as part of the planning process, specifying agreed processes for all phases of the investigation 2.5 Identify, document and obtain necessary resources to conduct the investigation, including expert advice if required 2.6 Identify, address and document **barriers to investigation** 2.7 Ensure planning includes agreed timelines, objectives, responsibilities, roles, documentation, actions and outcomes
3 Collect information and data	3.1 Identify and access sources of information and data 3.2 Inspect incident site, equipment and other evidence, and document outcome of inspection 3.3 Gather information and data in ways that ensure objectivity, confidentiality, validity and accuracy
4 Analyse information and data gathered to identify immediate and underlying causes and practical prevention measures	4.1 Ensure investigation team understands, identifies and applies the **conceptual basis for the analysis** 4.2 Construct **timeline of events** leading up to the incident 4.3 Investigate key events, conditions and/or circumstances that together resulted in the incident

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ELEMENT	PERFORMANCE CRITERIA
	4.4 Develop actions, interventions and practical measures to prevent the re-occurrence of the incident and to address **root causes** 4.5 Detail recommended actions, interventions or measures, and plans for their implementation and evaluation
5 Compile and communicate investigation report	5.1 Prepare a report on the investigation, using objective language 5.2 Cite evidence and basis for conclusions and recommendations 5.3 Communicate the report to relevant individuals and parties

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
Writing	1.1, 2.1, 2.3, 2.4, 2.5, 2.6, 2.7, 3.2, 4.2, 4.5, 5.1, 5.2	• Documents procedures, plans and outcomes using appropriate organisational formats and industry specific terminology • Develops reports using structure, format and language appropriate for purpose and audience
Oral communication	1.2, 1.4, 2.4, 3.3, 4.1, 5.3	• Uses appropriate language and non-verbal features to provide support, give instructions or request information • Listens closely to extract main ideas and to evaluate responses for accuracy and validity
Numeracy	2.7, 3.1, 4.3, 4.5	• Extracts and evaluates the mathematical information embedded in sources of incident information and data • Performs calculations in relation to resource requirements, timelines and evaluation measures
Navigate the world of work	1.1-1.4, 2.1	• Accepts responsibility for developing, implementing or modifying workplace procedures applicable to investigation contexts • Understands and keeps up to date with changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking work
Interact with others	1.2, 2.4, 3.3, 4.1, 5.3	• Identifies and uses appropriate conventions and protocols when communicating with parties involved

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		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 helping develop team understanding of investigation requirements
Get the work done	1.1, 1.3, 2.1, 2.2, 2.3, 2.5, 2.6, 2.7, 3.1, 3.3, 4.3, 4.4, 4.5, 5.1	• 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 investigation processes • Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, seeking input and advice from others when necessary • Uses digital systems and tools for data collection and analysis, and communication and reporting of incidents

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.

Incidents include:	• accidents
	• incidents as referred to in WHS legislation
	• major-to-minor incidents resulting in:
	  • major-to-minor injuries and diseases
	  • major-to-minor damage to property, equipment, work processes or the environment
	• near misses, where no injury or damage occurs

The incident analysis must be based on:	• adopting an open-minded and objective approach • analysing policies, procedures, processes and systems in place at the time of the incident • focusing on the 'how', 'what' and 'why' of the incident • not focusing on individual behaviour or fault • using applicable models of causation and occurrence.

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS505 Investigate WHS incidents	BSBWHS505A Investigate WHS incidents	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

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Assessment Requirements for BSBWHS505 Investigate WHS incidents

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:

- prepare and implement an initial response to an incident that complies with legislative and organisational requirements and considers the safety and security of individuals and the site
- systematically develop and document a plan to investigate an incident
- collect, document and analyse data and information relevant to an incident investigation ensuring that all individuals in the investigation team understand and follow required processes
- prepare and communicate an investigation report in required format that identifies the events leading up to the incident, immediate and underlying causes, points at which the incident could have been prevented and recommendations arising from the investigation.

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 ethics related to conducting an investigation
- describe the characteristics and composition of the workforce impacting on the investigation of work health and safety (WHS) incidents, including:
  - cultural background
  - workplace diversity
  - gender
  - language, literacy and numeracy levels
  - organisational structure, including employment status, shifts and geographical location
- list and describe internal and external sources of information and data relevant to investigations

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- describe organisational WHS policies, procedures, processes and systems relevant to work role
- describe requirements under WHS legislation for notifying and reporting incidents and enforcement notices, and rights and powers of WHS inspectors
- outline types and characteristics of incidents including causes and incident management processes.

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

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BSBWHS506 Contribute to developing, implementing and maintaining 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 contribute to the development, implementation and maintenance of elements of a work health and safety management system (WHSMS).

It applies to individuals 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 work health and safety (WHS) risks. These people will work in a range of WHS roles across all industries and will 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
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1 Contribute to development and implementation of a WHSMS	1.1 Access sources of information to determine the form, content, purposes and functions of a WHSMS 1.2 Identify duty holders and their roles and responsibilities in a WHSMS, according to WHS legislation 1.3 Advocate for the integration of return-to-work or injury management as part of an effective WHSMS 1.4 Contribute to the development of an organisational WHSMS that meets legal and organisational requirements 1.5 Communicate information about the WHSMS to relevant individuals and parties 1.6 Consult effectively with individuals and parties about implementing the WHSMS
2 Contribute to the development of WHS policy and commitment to the WHSMS	2.1 Communicate to individuals and parties the requirements of commitment to the WHSMS, and WHS policy 2.2 Contribute to the development and implementation of an initial WHS review, as required 2.3 Contribute to the development of WHS policy that meets requirements and is appropriate to the organisation 2.4 Facilitate and support the participation of, and consultation with, individuals and parties in developing WHS policy 2.5 Support documentation and communication of WHS policy to individuals and parties
3 Contribute to the development of the WHS plan	3.1 Communicate to individuals and parties the requirements of a WHS plan 3.2 Contribute to the development of a WHS plan appropriate to the organisation, that meets requirements 3.3 Facilitate and support the participation of, and consultation with individuals and parties in WHS plan development
4 Contribute to the implementation of the WHS plan	4.1 Communicate to individuals and parties the requirements for implementation of the WHS plan appropriate to the organisation 4.2 Contribute to the implementation of the WHS plan according to own job role 4.3 Facilitate and support the participation of, and consultation with individuals and parties in implementing the WHS plan
5 Contribute to the	5.1 Communicate to individuals and parties the requirements for

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ELEMENT	PERFORMANCE CRITERIA
measurement and evaluation of WHS performance	measurement and evaluation appropriate to the organisation 5.2 Contribute to measurement and evaluation according to own job role 5.3 Facilitate and support the participation of, and consultation with individuals and parties in measuring and evaluating WHS performance
6 Contribute to the review and improvement of the WHSMS	6.1 Communicate to individuals and parties the requirements for review and improvement appropriate to the organisation 6.2 Contribute to review and improvement according to own job role 6.3 Facilitate and support the participation of, and consultation with individuals and parties in reviewing and improving the WHSMS

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	• Identifies, interprets and critically analyses complex texts in relation to WHSMS information
Writing	1.3, 1.4, 1.5, 1.6, 2.1, 2.2, 2.3, 2.5, 3.1, 4.1, 5.1, 6.1	• Matches style of writing to purpose and audience in consulting, developing and communicating about WHSMS and WHS policy • Uses appropriate layout, vocabulary, grammatical structure and conventions in consulting, developing and communicating about WHSMS and WHS policy
Oral communication	1.3, 1.4, 1.5, 1.6, 2.1, 2.4, 3.1, 3.4, 4.1, 5.1, 5.3, 6.1, 6.3	• 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, seek and offer opinions
Numeracy	5.2	• Selects from, and applies, an expanding range of mathematical and problem-solving strategies in relation to WHMS measurement and evaluation
Navigate the world of work	1.1, 1.2, 2.1, 2.3	• Accepts responsibility for developing, implementing or modifying workplace policies and procedures applicable to WHSMS

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		• Understands and keeps up to date with changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking work
Interact with others	1.4, 1.6, 2.4, 5.3, 6.3	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	3.2, 3.3, 4.2, 4.3, 5.2, 6.2	• Sequences and schedules complex activities, monitors implementation and manages relevant communication in relation to WHS planning • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria in review and evaluation of WHSMS • Utilises digital systems and tools in the context of WHS plan implementation and measurement and evaluation of WHS performance

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems	BSBWHS506A Contribute to developing, implementing and maintaining 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

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Assessment Requirements for BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems

Modification History

Release	Comments
Release 1	This version first released with BSB01 Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to contribute to:

- developing, implementing, reviewing and improving a Work Health and Safety management system (WHSMS) for an organisation
- developing work health and safety (WHS) policy and gaining commitment to the WHSMS
- consultation and communications processes
- developing and implementing a WHS plan
- measuring and evaluating WHS 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:

- summarise the key elements of a WHSMS
- identify barriers to WHSMS implementation and strategies to remove them
- list the benefits to an organisation of having return-to-work and injury management integrated into the WHSMS
- list essential content of a WHS improvement action plan
- specify legislative requirements for WHS information and data, and consultation
- describe the nature of information and data that provide valid and reliable measures of performance of WHS management processes
- identify relevant Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material, and other relevant publications
- describe a range of commonly used WHSMS and the associated WHSMS certification standards

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- specify requirements for recordkeeping that address WHS, privacy and other relevant legislation
- describe the roles and responsibilities of individuals and parties under WHS legislation
- specify WHS positive performance indicators.

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 policies and procedures
- relevant Acts, regulations, codes of practice, standards and guidelines 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

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BSBWHS507 Contribute to managing WHS information 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 contribute to managing work health and safety information systems (WHSIS) to support work health and safety (WHS) management. It focuses on systems for gathering, managing and communicating information necessary for WHS management.

It applies to individuals who contribute to the management of a WHSIS. These people 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Contribute to identifying	1.1 Apply knowledge of WHS legislation and workplace policies,

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ELEMENT	PERFORMANCE CRITERIA
WHSIS requirements	procedures and systems to assist with identifying duty holders and WHS information necessary for effective WHS management in the organisation 1.2 Apply knowledge of WHS legislation and workplace policies, procedures and systems to assist with determining the functions and purposes of the WHSIS 1.3 Apply knowledge of organisation and consult with users of the WHSIS, to assist with specifying what users need from the system 1.4 Assist with identifying workplace factors that may impact on the design and development of the WHSIS
2 Contribute to the use and operation of the WHSIS	2.1 Provide advice and support to users to enable them to use the WHSIS effectively and to meet their WHS responsibilities and objectives 2.2 Gain feedback from users to assist with monitoring, evaluating and improving the WHSIS
3 Use the WHSIS to support effective WHS management as required by job role	3.1 Access and review relevant sources of WHS information and data, and evaluate information and data gathered 3.2 Collect and record information and data according to WHS legislation and workplace policies, procedures and systems, using appropriate tools 3.3 Meet legislated reporting requirements to external bodies within required time limits 3.4 Use appropriate analytical techniques to evaluate WHS performance and identify areas for WHS improvement 3.5 Regularly review and analyse WHS information and data in consultation with users to ensure organisational and WHS legislative requirements are met 3.6 Make recommendations for improvement in prevention strategies based on information and data analysis 3.7 Communicate WHS information to individuals and parties as required by WHS legislation and workplace policies, procedures and systems
4 Assist with monitoring, evaluating and improving the WHSIS	4.1 Apply knowledge of WHSIS requirements to assist with identifying elements of the WHSIS needing improvement 4.2 Assist with developing and implementing measures to improve the WHSIS 4.3 Facilitate user participation and consultation during WHSIS monitoring, evaluation and improvement activities

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ELEMENT	PERFORMANCE CRITERIA
	4.4 Identify training needs of WHSIS users and take action as appropriate 4.5 Determine frequency, method and scope of WHSIS review in consultation with users

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	• Interprets and critically analyses complex texts in relation to WHSIS • Applies appropriate strategies to construct meaning from complex texts in relation to WHSIS
Writing	2.2, 3.3, 3.7	• Matches style of writing to purpose and audience • Uses appropriate layout, vocabulary and grammatical structure for reporting on WHSIS performance or improvements
Oral communication	2.1, 2.2, 3.7, 4.5	• Presents information about WHSMS and WHS policy using structure and language appropriate to the audience • Uses questions and active listening to extract main ideas and clarify understanding
Numeracy	3.1	• Extracts and evaluates the mathematical information embedded in WHSIS information and data
Navigate the world of work	1.1, 1.2, 1.3, 3.2, 3.3, 3.5, 3.7	• Understands own legal rights and responsibilities and applies understanding of general legal principles in relation to WHSIS • Keeps up to date on changes to legislation or regulations relevant to rights and responsibilities and considers implications of these in relation to WHSIS
Interact with others	1.3, 2.1, 4.3, 4.5	• Collaborates with others to achieve joint outcomes, 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	1.4, 3.2, 3.3, 3.4,	• Plans, organises and implements tasks required to

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done	3.5, 3.6, 4.1, 4.2, 4.4	implement the WHSIS • Uses a formal decision making process setting or clarifying goals, gathering information, and identifying and evaluating several choices against a limited set of criteria in identifying training needs • Applies formal problem solving processes to identify WHSIS improvements, breaking complex issues into manageable parts and identifying and evaluating several options for action • Where appropriate, seeks feedback or advice before implementing a solution • Uses common digital systems and tools and operates them effectively to complete WHSIS-related 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

The function and purpose of the WHSIS is to:	• document and communicate WHS and other relevant procedures, policies, processes and systems • facilitate keeping track of legal requirements and compliance • facilitate and support consultation and participation • describe and communicate the core elements of the management system and their interaction, and provide direction to related documentation • support awareness of what is required to achieve the organisation's WHS objectives and enable the evaluation of the system and WHS performance.
Users of the WHSIS must include:	• individuals and parties who directly or indirectly access and use information from the WHSIS and/or provide and input information into the WHSIS.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS507	BSBWHS507A	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
Contribute to managing WHS information systems	Contribute to managing WHS information systems	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

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Assessment Requirements for BSBWHS507 Contribute to managing WHS information 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 contribute to:

- identifying Work Health and Safety Information Systems (WHSIS) legislative and organisational requirements including:
  - duty holders and roles
  - WHS information for effective work health and safety (WHS) management
  - functions and purposes
  - user needs
  - workplace factors
- using the WHSIS including:
  - advising and supporting users
  - gaining feedback for monitoring, evaluation and improvement
- using the WHSIS to support effective WHS management as required by job role including:
  - accessing and reviewing WHS information and data and their sources
  - collecting and recording WHS information and data that addresses legislative and organisational requirements, using appropriate tools
  - meeting external reporting requirements in a timely manner
  - using appropriate analytical techniques to evaluate WHS performance and identify improvement areas
  - regularly reviewing and analysing WHS information and data to ensure legislative and organisational requirements are met
  - recommending improvements in prevention strategies based on information and data
  - communicating WHS information and data according to legislative and organisational requirements
- assisting with monitoring and evaluating the WHSIS, and developing and implementing improvement measures incorporating:

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- user participation and consultation, including with regard to frequency, method and scoping of WHSIS review
- identification and actioning of training 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:

- identify information and data relevant to the organisation and its needs (which is a function of the size and nature of the organisation) and to specific hazards in the workplace
- identify commonwealth and state or territory WHS Acts, regulations, codes of practice, standards, guidance material and links to other relevant legislation, including industrial relations, equal employment opportunity, workers' compensation and rehabilitation
- outline due diligence obligations as referred to in WHS Acts, regulations and codes of practice
- list internal and external sources of WHS information and data, and how to access them
- identify key personnel, including change agents, within workplace management structure
- summarise the language, literacy and cultural profile of the work team
- summarise legislative requirements for WHS information and data, and consultation
- describe methods for collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming these problems
- describe methods for providing evidence of compliance with WHS legislation
- describe the nature of information and data that provide valid and reliable measures of performance of WHS management processes
- outline organisational WHS policies, procedures, processes and systems
- detail the requirements for record keeping that address WHS, privacy and other relevant legislation
- list the requirements for reporting under WHS and other relevant legislation, including obligations for notification and reporting of incidents
- summarise the roles and responsibilities of individuals and parties under WHS legislation
- describe systems for storage and retrieval of information and data.

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:

- reports and sample software for WHS information and data collation and analysis
- relevant Acts, regulations, codes of practice, standards and guidelines
- case studies and, where possible, real situations

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- 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

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BSBWHS508 Manage WHS hazards associated with plant

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 effectively manage work health and safety (WHS) hazards and to comply with WHS legislation as it applies to the management or control of plant (not the design, manufacture, supply, installation, construction or commissioning of plant or issuing of licences associated with plant).

It applies to individuals who may provide leadership and guidance to others using managerial and communication skills and who use systematic approaches to identify and resolve issues.

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.

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

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Comply with WHS	1.1 Apply knowledge of WHS legislation to advise individuals and

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ELEMENT	PERFORMANCE CRITERIA
legislation as it applies to plant	parties of their duties, rights and obligations with regard to plant as appropriate to their job roles and the nature of the organisation 1.2 Ensure the management of hazards associated with plant, complies with relevant WHS legislation and organisational policies, procedures, processes and systems
2 Ensure organisational policies, procedures, processes and systems incorporate effective management of hazards associated with plant	2.1 Apply knowledge of organisational policies, procedures, processes and systems to determine if they effectively manage hazards associated with plant 2.2 Develop and implement modifications to organisational policies, procedures, processes and systems as necessary to ensure hazards associated with plant are effectively managed 2.3 Follow organisational policies, procedures, processes and systems when managing hazards associated with plant
3 Identify WHS hazards associated with plant	3.1 Access sources of information, data and advice to assist with identifying hazards associated with plant 3.2 Identify and consult with others, as necessary, as part of hazard identification 3.3 Record and report on hazard identification
4 Assess WHS risks associated with plant	4.1 Access sources of information, data and advice to assist with assessing WHS risks associated with plant hazards 4.2 Identify and consult with others, as necessary, as part of WHS risk assessment 4.3 Record and report on WHS risk assessments
5 Control WHS risks associated with maintenance and continued safe use of plant	5.1 Access sources of information, data and advice, including the outcomes of risk assessments to assist with developing risk control options for hazards associated with the maintenance and continued safe use of plant 5.2 Identify, consult with and report to others as necessary, during all stages of risk control 5.3 Develop risk control options and determine which options will be implemented 5.4 Implement, evaluate and monitor risk controls 5.5 Record and report on risk controls 5.6 Review risks controls implemented and recommend improvements, where necessary
6 Advise on registration,	6.1 Identify types of plant requiring registration and tasks requiring

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ELEMENT	PERFORMANCE CRITERIA
licensing and certification issues associated with plant	operator licensing and/or certification, in accordance with legislative requirements 6.2 Document registration, licensing and certification requirements and communicate these to individuals and parties 6.3 Identify, document and communicate to individuals and parties, training requirements to meet registration, licensing and certification, in accordance with legislative requirements 6.4 Determine training needs required for new plant and/or new operating methods 6.5 Ensure training is undertaken and completed prior to commencement of work using new plant and/or new operating methods 6.6 Monitor and report compliance with regulatory requirements for registration, licensing and certification 6.7 Identify, document and maintain appropriate records for plant and operator skill requirements

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, 2.2, 3.1, 4.1, 5.1, 5.6, 6.1, 6.3, 6.7	• Analyses a wide range of technical, non-technical information and numeric data to determine actions and adhere to requirements
Writing	1.1, 2.2, 3.2, 3.3, 4.3, 5.1-5.3, 5.5, 5.6, 6.2, 6.3, 6.6, 6.7	• Matches style of writing to purpose and audience • Uses appropriate formats, vocabulary and grammatical structures to record, report and present information
Oral Communication	1.1, 3.1-3.3, 4.1-4.3, 5.1, 5.2, 5.5, 5.6, 6.2, 6.3, 6.6	• Explains information clearly and involves others in collaborative discussions using listening and questioning techniques • Uses pace, intonation and gestures to present information and encourage engagement with others
Numeracy	2.1, 2.2, 3.1-3.3, 4.1, 5.1,	• Collates, interprets and compares numerical and statistical information to apply relevance to requirements

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Navigate the world of work	1.1, 1.2, 2.1-2.2, 6.1, 6.5	• Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulations • Modifies or develops organisational policies and procedures to comply with legislative requirements and organisation goals
Interact with others	1.1, 3.1-3.3, 4.1-4.3, 5.1, 5.2, 6.2, 6.3	• Establishes and uses appropriate conventions and protocols when communicating with others regarding management of WHS • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	2.2, 2.3, 3.1-3.3, 4.1-4.3, 5.1-5.6, 6.1-6.7	• Takes responsibility for developing and applying organisational processes to aid compliance with legislative requirements • Sequences and schedules complex activities, monitors implementation, records progress and manages relevant communication • Systematically gathers and analyses all relevant information and evaluates options in order to make informed decisions • Uses formal analytical thinking techniques for identifying issues and generating possible solutions, seeking input from others when necessary • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Fully utilises features of digital tools to complete complex tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS508 Manage WHS hazards associated with plant	BSBWHS508A Manage WHS hazards associated with plant	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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

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Assessment Requirements for BSBWHS508 Manage WHS hazards associated with plant

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 identification of hazards and develop risk control options for the operation of plant as defined in work health and safety (WHS) legislation
- develop, implement, monitor and modify WHS policies and procedures for the operation of plant
- use relevant systems and procedures in the operation and maintenance of plant
- implement general licensing and training requirements associated with plant
- identify, record and report on WHS hazards and assessing risk
- develop and implement risk control options
- communicate in the workplace to:
  - advise people of their rights, obligations and duties
  - consult about policies and procedures
  - identify hazards
  - assess WHS risk
  - advise people about registration, licensing and certification requirements
- use machinery safety control measures to control plant risks, including following registration and licensing requirements
- identify training needs and organise training.

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 incident causation and injury processes
- explain the differences between a hazard and a risk

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- identify factors that impact on risk
- explain the hierarchy of control and considerations for choosing between different risk controls
- identify high-risk work licences required for specific plant
- identify internal and external sources of WHS information and data, and explain how to access these sources
- discuss the management of risk associated with plant as a duty of a person conducting a business or undertaking (PCBUs) under WHS legislation
- describe the methods for providing evidence of compliance with WHS legislation
- outline workplace processes (such as work flow, planning and control) and hazards relevant to the workplace
- discuss organisational behaviour and culture as it impacts on WHS, change and work team
- describe the key features of organisational WHS policies, procedures, processes and systems
- identify other functional areas that impact on the management of WHS
- outline key features of plant specific knowledge including:
  - basic physics of fluids under pressure and pressure vessels, and the behaviour of pressurised fluid when pressure is released
  - duties, rights and obligations of individuals and parties specified in WHS legislation
  - hazards associated with plant and 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
- describe the key principles and practices of a systematic approach to managing WHS
- describe the strategies for guarding moving parts in machinery, human factors related to machine guarding, safe design principles, features and limitations
- outline the key features of WHS Acts, regulations, codes of practice and other instruments issued by WHS regulators.

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:

- manufacturers' manuals including specifications and operational information and data
- relevant WHS Acts, regulations, codes of practice, standards, guidelines
- sources of information, data and advice
- workplace policies and procedures
- workplace equipment and resources
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBWHS509 Facilitate 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 1.0

Application

This unit describes the skills and knowledge required to facilitate the development and use of WHS risk management tools.

It applies to individuals with responsibility for risk management. These people will work in a range of work health and safety (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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Select and develop WHS risk management	1.1 Apply knowledge of risk management tools that address requirements of the WHS legislation and the workplace

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ELEMENT	PERFORMANCE CRITERIA
tools	1.2 Consult with individuals and parties on suitable risk management tools 1.3 Modify existing risk management tools and/or develop new ones to meet workplace requirements 1.4 Determine risk management tools to be used in the workplace
2 Facilitate the use of WHS risk management tools	2.1 Develop and conduct required training and instruction for individuals and parties who will use risk management tools 2.2 Consult and liaise with individuals, parties and work areas regarding logistical arrangements necessary for the use of risk management tools 2.3 Facilitate, in collaboration with individuals and parties, necessary logistical arrangements 2.4 Use and apply risk management tools 2.5 Provide support to individuals and parties to use risk management tools
3 Communicate outcomes of use of risk management tools	3.1 Collate and analyse results and findings of the use of risk management tools 3.2 Communicate results, findings and outcomes to individuals and parties
4 Review use of risk management tools	4.1 Review usefulness and usability of risk management tools 4.2 Modify and/or change risk management tools, based on the review outcomes 4.3 Modify consultation, liaison, logistical arrangements and communications, based on the review outcomes

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, 3.1, 4.1	• Interprets and critically analyses complex texts to identify suitable risk management tools • Applies appropriate strategies to construct meaning from complex texts when identifying legislative and

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		workplace requirements
Writing	1.3, 3.3, 4.2, 4.3	• Develops or modifies risk management tools and arrangements • Communicates risk management arrangements and outcomes using layout vocabulary, grammatical structure and conventions appropriate to context and audience
Oral communication	1.2, 2.1, 2.2, 2.3, 3.2	• Presents information about risk management using structure and language appropriate to the audience • Asks questions and listens to extract main ideas across a range of contexts
Numeracy	3.1, 3.2	• Extracts and evaluates the mathematical information • embedded in a range of tasks and texts in risk management processes
Navigate the world of work	1.1	• Understands own legal rights and responsibilities and extends understanding of general legal principles applicable across WHS risk management contexts • 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	1.2, 2.1, 2.2, 2.3, 3.2	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, in relation to consultations and use of risk management tools • Provides feedback to others in forms they can engage with and respond to when supporting use of tools
Get the work done	1.3, 1.4, 2.1, 2.4, 2.4, 2.5, 3.1, 4.1-4.3	• Sequences and schedules complex activities, monitors implementation and manages relevant communication when designing and conducting training • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, seeking input and advice from others before taking action when necessary • Contributes to the design of new approaches within the immediate work environment • Uses digital systems and tools effectively to complete routine tasks, adapting some functions to improve personal efficiency

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS509 Facilitate the development and use of risk management tools	BSBWHS509A Facilitate the development and use of hazard-management tools	Updated to meet the 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

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Assessment Requirements for BSBWHS509 Facilitate 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 1.0.

Performance Evidence

Evidence of the ability to:

- select, develop and modify suitable work health and safety (WHS) risk management tools, in consultation with others, that address the workplace and legal requirements
- facilitate the use of WHS risk management tools including:
  - developing and conducting training for users
  - consulting on and facilitating logistical arrangements for use
  - supporting users
- use and apply WHS risk management tools and communicate outcomes including:
  - completing risk management process steps
  - facilitating logistical arrangements
  - collating and analysing results and findings
  - communicating results, findings and outcomes to others
- review usefulness and usability of WHS risk management tools and make changes based on the review outcomes.

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 risk management tools, their correct application, use and limitations
- identify internal and external sources of WHS information and data, and how to access them
- outline the language, literacy and cultural profile of the work team
- describe WHS risk management methods, techniques, procedures and processes, including:

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  - correct application and use
  - limitations
  - usefulness and usability
- summarise the nature of workplace processes (work flow, planning and control) and hazards relevant to the workplace
- outline organisational WHS policies, procedures, processes and systems
- identify other functional areas that impact on the management of WHS
- describe techniques, tools and processes for identifying WHS hazards including:
  - hazard and risk checklists
  - hazard hunts
  - job safety analyses
  - manifests and registers, including for dangerous goods, hazardous chemicals and plant
  - surveys using questionnaires, interviews and other survey techniques
  - safe work method statements
  - workplace inspections and walk throughs
- describe tools, techniques and methods to address specific physical or psychosocial risks
- outline WHS Acts, regulations, codes of practice and other instruments issued by WHS regulators and how they apply to the organisation.

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:

- relevant WHS Acts, regulations, codes of practice, standards and guidelines
- sources of information, data and advice
- risk management tools
- workplace policies and procedures
- 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

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BSBWHS510 Contribute to implementing emergency procedures

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 contribute to the implementation of planning and response procedures for emergencies. The focus is on 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.

This unit applies to individuals 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 will work in a range of WHS roles across all industries and who 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

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ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Identify potential emergencies	1.1 Apply knowledge of WHS hazards and relevant standards to identify causes of potential emergencies 1.2 Seek input of stakeholders in identifying potential emergencies 1.3 Identify and liaise with appropriate specialist advisors and emergency agencies to identify causes of potential emergencies 1.4 Develop a risk register to identify potential emergencies and their 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 on personnel, property and the environment 2.4 Identify requirements for liaison with emergency agencies 2.5 Prioritise actions to be taken during emergencies
3 Plan initial response procedures	3.1 Identify resources available and required for immediate response 3.2 Check emergency equipment to ensure 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 agencies 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 emergency response 4.3 Follow appropriate procedures
5 Contribute to post-event activities	5.1 Identify and support other personnel involved in the second response phase 5.2 Make contributions to debriefing processes
6 Monitor emergency response and address deficiencies	6.1 Monitor responses to emergencies for efficiency and timeliness, in consultation with stakeholders and, as appropriate, specialist advisors and agencies 6.2 Document, and promptly and appropriately report, results of monitoring to appropriate persons

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ELEMENT	PERFORMANCE CRITERIA
	6.3 Identify areas for organisational and personal improvement and make improvement recommendations based on analysis of response

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, 3.3, 2.4, 4.3	• Interprets and critically analyses complex texts when planning emergency response procedures • Applies appropriate strategies to construct meaning from complex texts to assist in planning emergency response procedures
Writing	1.4, 3.3, 4.1, 6.2	• Develops risk registers, reports and associated documentation according to organisational requirements • Uses vocabulary, grammatical structure and conventions appropriate to text in developing risk registers, reports and other documentation
Oral communication	1.2, 1.3, 5.1, 5.2	• Asks questions and listens to gather information about potential risk situations • Provides information during or after emergency response situations using structure and language appropriate to the audience
Navigate the world of work	1.1, 2.4, 4.2, 4.3	• Understands how own role meshes with others and contributes to broader goals in emergency response contexts • Understands own legal rights and responsibilities and is extending understanding of general legal principles applicable across emergency responses contexts • Keeps up to date on changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these in emergency response contexts
Interact with others	1.2, 1.3, 5.1, 5.2	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Takes a leadership role on occasion in supporting,

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		consulting and liaising in emergency response contexts
Get the work done	2.1, 2.2, 2.3, 2.5, 3.1, 3.2, 3.4, 6.1, 6.3	• Formulates plans, monitors actions against stated goals, adjusting plans and resources to cope with contingencies • Uses a formal decision-making process, setting or clarifying goals, gathering information, and identifying and evaluating several choices to determine appropriate actions and responses • Applies formal problem-solving processes when identifying actions required in emergencies and associated training needs, breaking complex issues into manageable parts and identifying and evaluating options for action • Reflects on outcomes and feedback from others in order to identify general principles and concepts that may be applicable in new situations • Recognises the potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS510 Contribute to implementing emergency procedures	BSBWHS510A Contribute to implementing emergency procedures	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

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Assessment Requirements for BSBWHS510 Contribute to implementing emergency procedures

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 emergencies and their causes, with input from others, including specialist advisers and emergency agencies and document them in a risk register
- identify and prioritise options for initial response to contain or limit emergencies and their impact, and for liaison with emergency services
- plan initial response procedures including:
  - categorising major types of potential emergencies
  - identifying required resources
  - checking equipment
  - documenting required actions for a range of major types of emergency, with input from others and in keeping with standards and current industry practice
  - identifying training needs and providers
- implement initial response procedures including:
  - documenting and displaying actions required
  - outlining own role
  - following appropriate procedures
- contribute to post-event activities including supporting others and contributing to debriefing
- monitor emergency response and address deficiencies including:
  - consulting
  - documenting and reporting results
  - identifying improvements.

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

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Knowledge Evidence

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

- describe basic emergency prevention controls typically installed in a workplace including:
  - emergency alerting systems
  - emergency protection systems
  - smoke alarms, fire alarms and fire extinguishers
  - required safety wear
  - security systems
- describe the enterprise physical site and work areas
- explain enterprise reporting procedures for an emergency
- detail the essential actions of self and others in an emergency
- describe hazards and precautions to be taken during an emergency
- list hazards arising from evacuation
- detail the information needs of emergency response personnel during reporting, arrival and response to an emergency
- identify internal and external sources of work health and safety (WHS) information and data and how to access them
- summarise organisational and workplace WHS policies and procedures
- describe the organisational structure, roles and responsibilities contributing to the implementation of emergency procedures
- describe the powers of safety representatives and other authorised WHS personnel to implement an immediate cease work if an immediate danger to WHS exists
- summarise the principles and priorities for evacuation, checking and accounting for people
- summarise the principles of fire protection and emergency response
- outline relevant Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material and how it applies to the implementation of emergency procedures
- identify roles and responsibilities of WHS personnel
- give examples of emergency responses typically used in workplaces
- detail the WHS information needs of work unit or work team.

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 policies and procedures
- WHS legislation, regulations and codes of practice
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBWHS601 Apply legislative frameworks for WHS

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 assist with providing advice about the legislative duties, rights and obligations of individuals and parties prescribed in Work Health and Safety (WHS) and other relevant legislation.

It applies to individuals who assist with providing advice about the WHS legislative duties, rights and obligations of individuals and parties in a workplace.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Assist with providing appropriate advice about legislative frameworks	1.1 Ensure assistance provided is appropriate to own job responsibilities and functions 1.2 Identify own limits of skills, knowledge and competence when

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ELEMENT	PERFORMANCE CRITERIA
relevant to WHS	providing assistance 1.3 Seek advice from or refer matters to legal advisors and others in situations where necessary
2 Assist with determining legislative frameworks relevant to WHS	2.1 Monitor current WHS legislation and other legislation, related documentation and other sources relevant to the organisation and its operations 2.2 Identify changes, amendments and emerging issues in legislation relevant to the organisation 2.3 Assist with determining current and future legal requirements relevant to WHS in the workplace 2.4 Assist with identifying, confirming, reviewing and updating the duties, rights and obligations of individuals and parties as specified in legislation 2.5 Communicate changes, amendments and emerging issues in legislation to individuals and parties 2.6 Seek advice from legal advisors and other sources where necessary
3 Assist with providing advice on compliance with legislative frameworks relevant to WHS	3.1 Assist with providing advice to individuals and parties about their compliance with duties, rights and obligations under WHS legislation and other legislation relevant to WHS 3.2 Assist with providing advice to individuals and parties about the functions, powers and exercise of powers of WHS and other relevant regulators
4 Assist with evaluating and implementing measures to comply with legislative frameworks relevant to WHS	4.1 Assist with assessing how the workplace complies with WHS and other relevant legislation 4.2 Assist with identifying the training needs of individuals and parties about duties, rights and obligations 4.3 Assist with developing, delivering and evaluating training to meet identified training needs and any legislative requirements for training 4.4 Assist with developing, implementing and evaluating changes to workplace procedures, activities, processes, policies and systems that will achieve compliance

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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, 2.2, 2.3, 2.4, 4.1	• Interprets and critically analyses complex texts in relation to WHS legislation • Applies appropriate strategies to construct meaning from complex texts in relation to WHS legislation
Writing	2.4, 2.5, 2.6, 3.1, 3.2, 4.2, 4.3, 4.4	• Communicates complex relationships between ideas and information, matching style of writing to purpose and audience • Uses appropriate vocabulary, grammatical structure and conventions in texts about WHS legislation related issues
Oral communication	2.5, 2.6, 3.1, 3.2	• Provides compliance information or advice using language appropriate to the audience • Applies active listening and questioning skills to extract main ideas from oral texts around WHS legislation-related issues
Navigate the world of work	1.1-1.3, 2.1-2.5, 4.4	• Understands the nature and purpose of own role and associated responsibilities and how it contributes to the work of others • Modifies or develops organisational policies and procedures to comply with legislative requirements and organisation goals • Keeps up to date with changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking work related to provision of WHS advice
Interact with others	1.3, 2.5, 2.6, 3.1, 3.2, 4.3	• Selects appropriate communication protocols and conventions for working with WHS personnel and other stakeholders • 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 • Forms connections with legal advisors and others who can contribute to effective outcomes
Get the work done	1.3, 2.6, 4.1, 4.2, 4.3, 4.4	• Takes responsibility for decisions about when and how to complete tasks and when to consult with legal advisors and others

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		• Systematically gathers and analyses all relevant information and evaluates options in order to assess compliance or identify training needs

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS601 Apply legislative frameworks for WHS	BSBWHS601A Apply legislative frameworks for WHS	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

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Assessment Requirements for BSBWHS601 Apply legislative frameworks for WHS

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 own competence limits and scope for providing advice about legislative frameworks relevant to work health and safety (WHS) seeking assistance from legal advisors and others where necessary
- assist with determining legislative frameworks relevant to WHS by monitoring relevant legislation and other documentation
- identify and effectively communicate to relevant stakeholders the current, emerging and future legislative requirements and issues in relation to the organisation including duties, rights and obligations of individuals and parties
- assist with providing advice on compliance with WHS and other legislative frameworks relevant to WHS, including advice on regulator functions, powers and exercise of powers
- assist with evaluating and implementing measures to comply with legislative frameworks relevant to WHS, including addressing required training and changes required to achieve compliance.

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 duties, rights and obligations of individuals and parties as specified in relevant WHS legislation and where this information is located in WHS legislation
- identify effective consultation and participation processes
- identify existing work health and safety information system (WHSIS) or other workplace information systems
- describe functions and powers of the WHS regulator, and how they are exercised

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- describe objectives and principles underpinning WHS legislation and related legislation
- describe relationship between the WHS Act, regulations, codes of practice, standards and guidance material, and other legislation relevant to WHS
- explain relevant sections of Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards, guidance material and other instruments
- identify sources of information about WHS legislation and related legislation
- explain systematic approaches to managing and complying with WHS legislation
- identify workplace policies, procedures, activities, processes and systems that will achieve compliance with WHS legislation and related legislation.

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:

- relevant Acts, regulations, codes of practice, standards and guidance material
- workplace documentation including policies and procedures
- reports from other parties consulted in ensuring compliance with required legislation
- 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

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BSBWHS602 Facilitate WHS activities

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 effectively with key work health and safety (WHS) personnel and stakeholders and with WHS and other professionals.

This unit involves identifying and engaging with key personnel and stakeholders and selecting communication strategies to provide them with required information and tools. It also covers facilitating and evaluating the effectiveness of collaborative work with WHS and other professionals.

It applies to individuals who are required to coordinate and facilitate WHS activities.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*

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ELEMENT	PERFORMANCE CRITERIA
1 Identify and engage with key WHS personnel and stakeholders	1.1 Apply knowledge of workplace and organisation to identify key WHS personnel and stakeholders 1.2 Liaise and negotiate with key WHS personnel and stakeholders individually and in groups, formally and informally 1.3 Review effectiveness of working relationships with key WHS personnel and stakeholders, and make changes to achieve any required improvements 1.4 Apply ethics relating to professional practice principles and ethics in working with others
2 Communicate effectively with key WHS personnel and stakeholders	2.1 Identify WHS information and communication needs and requirements of key WHS personnel and stakeholders 2.2 Identify and implement communication strategies using appropriate tools and methods 2.3 Review effectiveness of communication strategies and make changes to achieve any required improvements
3 Work effectively with key WHS personnel and stakeholders	3.1 Determine WHS roles, functions and responsibilities of self and key WHS personnel and stakeholders 3.2 Collaborate with key WHS personnel and stakeholders to gain agreement on roles, functions and responsibilities 3.3 Fulfil own WHS roles, functions and responsibilities and support others to fulfil their WHS roles, functions and responsibilities 3.4 Review own effectiveness and that of others and work with others to achieve required improvements
4 Work with WHS and other professionals	4.1 Recognise scope of WHS competencies of self and others 4.2 Identify particular WHS issues beyond own role, responsibilities and competencies requiring WHS and other professional expertise 4.3 Identify appropriate types and sources of expertise required to address particular WHS issues 4.4 Collaborate with WHS and other professionals to identify and agree on scope of work to be undertaken, types of services required and how they will work with self and others 4.5 Facilitate and support the work to be undertaken 4.6 Evaluate work undertaken to ensure requirements were met, taking action as required

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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, 4.3	• Evaluates and integrates information and ideas to construct meaning from a range of familiar, and some unfamiliar, texts and text types to identify key WHS personnel and stakeholders
Writing	1.2, 2.2, 3.1	• Drafts and develops required documentation, matching style of writing to purpose and audience • Uses appropriate vocabulary, grammatical structure and organisational conventions to document roles and strategies
Oral communication	1.2, 1.3, 2.1, 2.2, 3.4, 4.4, 4.5	• Participates in discussions using language appropriate to the audience • Applies active listening and questioning skills to extract main ideas from oral texts
Navigate the world of work	1.4, 3.1	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.2, 1.3, 2.1, 2.2, 2.3, 3.2, 3.3, 4.4, 4.5	• Selects appropriate communication channels, protocols and conventions for working with WHS personnel and stakeholders • Recognises the importance of building to establish effective working relationships with WHS personnel and other stakeholders • 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
Get the work done	1.1, 1.3, 2.1, 2.2, 2.3, 3.3, 3.4, 4.1, 4.2, 4.4, 4.6	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify and work effectively with multiple stakeholders • Considers whether, and how, others should be involved, often using consultative or collaborative processes as an integral part of the decision making process • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria when reviewing effectiveness of working with others

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		• Applies formal problem solving processes when identifying needs and requirements of WHS personnel and stakeholders • 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**
BSBWHS602 Facilitate WHS activities	BSBWHS602A Facilitate WHS activities	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

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Assessment Requirements for BSBWHS602 Facilitate WHS activities

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 and engage with key work health and safety (WHS) personnel and stakeholders including:
  - liaising and negotiating individually and in groups, formally and informally
  - reviewing and improving effectiveness of working relationships
  - applying ethics relating to professional practice
- communicate effectively with key WHS personnel and stakeholders including:
  - identifying communication needs and requirements
  - identifying and implementing suitable communication strategies, tools and methods
  - reviewing and improving effectiveness of communication
- work effectively with key WHS personnel and stakeholders including:
  - determining and gaining agreement on roles, functions and responsibilities
  - fulfilling, and supporting others to fulfil, roles, functions and responsibilities
  - reviewing and improving effectiveness of own and others' work
- work with WHS and other professionals including:
  - identifying issues beyond scope of own competencies
  - identifying suitable expertise to address these issues
  - collaborating on scoping of work
  - facilitating and supporting work
  - evaluating work to ensure it meets requirements and tasking action for remediation
- develop a comprehensive brief or case to engage a WHS or other professional to address an identified WHS issue.

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

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Knowledge Evidence

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

- outline the benefits, limitations and use of a range of communication strategies and tools appropriate to the workplace
- outline ethics related to professional practice
- detail formal and informal communication and consultation processes, and key personnel related to communication
- identify key WHS personnel and stakeholders
- describe language, literacy and cultural profile of the work team
- describe legal liability in relation to providing advice
- outline nature of workplace processes (work flow, planning and control) and hazards relevant to the workplace
- describe organisational behaviour and culture as they impact on WHS and on change
- describe organisational culture as it impacts on the work team
- identify organisational WHS policies, procedures, processes and systems
- describe particular WHS issues requiring WHS and other professional expertise to be addressed
- summarise roles and responsibilities in relation to communication and consultation for health and safety committees, health and safety representatives, line management, workers and inspectors
- summarise roles, functions, skills and knowledge of WHS and other professionals
- outline workplace policies, procedures, processes, systems, activities, actions and arrangements that support and enable effective consultation on, and participation in, effective WHS management.

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
- organisational documentation, information and data
- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
participation processes	1.2 Apply knowledge of effective WHS consultation and participation processes to review existing consultation and participation processes 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 1.4 Use consultation and participation processes to ensure WHS risk management processes are appropriate to the organisation and the WHS risks
2 Arrange for necessary resources during WHS risk management	2.1 Identify necessary resources required for each stage of WHS risk management 2.2 Budget for necessary resources 2.3 Procure resources and ensure availability as required
3 Review and improve existing WHS risk management processes	3.1 Access existing workplace WHS information and data 3.2 Identify existing WHS risk management processes 3.3 Consult with individuals and parties on WHS risk management processes 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 3.5 Use results of review to develop and implement effective WHS risk management
4 Establish the WHS risk management framework	4.1 Identify sources of information and data 4.2 Obtain information and data to determine the purposes, objectives, principles and framework of a systematic approach to WHS risk management
5 Establish the context for WHS risk management	5.1 Apply knowledge of WHS legislation to identify duty holders and legislative requirements for WHS risk management 5.2 Identify individuals and parties impacting on WHS risk management 5.3 Identify factors that will impact on WHS risk management 5.4 Establish context of the WHS risk management process 5.5 Define risk criteria
6 Assess risks	6.1 Apply knowledge of WHS hazards and risks to undertake hazard identification 6.2 Apply knowledge of WHS legislation, WHS risk assessment and

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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 (WHSMS) to monitor and review WHS risk management 8.2 Apply knowledge of the organisation's WHS information system (WHSIS) 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	• 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	• 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	• 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	• 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	• Understands own legal rights and responsibilities and is

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world of work		extending understanding of general legal principles applicable across WHS risk management contexts • 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	• 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	• 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

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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 exiting 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:

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    - 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.

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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

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BSBWHS604 Evaluate the WHS performance of organisations

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 evaluate the effectiveness of an organisation's work health and safety (WHS) performance including evaluation of hazard identification and risk management arrangements, processes for monitoring WHS, and the outcomes of WHS management arrangements. It also incorporates assessing and advising on compliance with agreed benchmarks and legislation.

It applies to people who apply advanced practical knowledge 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Evaluate the	1.1 Identify workplace hazard identification activities and compare

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ELEMENT	PERFORMANCE CRITERIA
effectiveness of the organisation's WHS hazards identification arrangements	them with organisational WHS policies and procedures 1.2 Examine products, processes and systems to determine whether hazards of long latency and low frequency/high consequence are included and controlled 1.3 Examine products, processes and systems to determine whether risks to persons other than workers are identified and controlled 1.4 Identify organisational factors that impact on WHS 1.5 Review outcomes of examinations with specialist personnel, if required
2 Evaluate the effectiveness of the organisation's WHS risk management arrangements	2.1 Evaluate appropriateness of the organisation's risk assessment tools and processes 2.2 Assess outcomes of risk assessment processes with regard to validity and reliability, and inclusion of all major WHS risks 2.3 Evaluate risk controls for suitability and effectiveness in relation to the organisation's management of WHS
3 Evaluate the effectiveness of the organisation's WHS monitoring processes	3.1 Identify organisational processes to monitor the implementation and status of its WHS management 3.2 Evaluate the quality of information and data obtained from the monitoring processes 3.3 Evaluate management's response to issues identified by the monitoring processes
4 Assess the outcomes of the organisation's WHS management arrangements	4.1 Evaluate performance indicators, including positive performance indicators (PPIs), to determine whether they provide a true, reliable and timely measure of the effectiveness of the organisation's WHS management 4.2 Compare reported performance with evidence gathered and document the differences 4.3 Evaluate WHS performance outcomes and document them in a clear and objective manner 4.4 Determine whether arrangements for managing WHS have produced improvement in WHS risk management
5 Assess and advise on the organisation's WHS compliance with agreed benchmarks and legislation	5.1 Undertake systematic analysis to identify areas of WHS compliance and non-compliance with agreed benchmarks 5.2 Provide advice on compliance with WHS legislation with regard to the organisation's WHS management arrangements 5.3 Document outcomes of evaluation of compliance and report to

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ELEMENT	PERFORMANCE CRITERIA
	key personnel and stakeholders

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, 3.1, 4.2, 5.1	• Interprets, analyses and evaluates complex organisational texts, in relation to WHS policies, procedures and systems
Writing	4.2, 4.3, 5.2, 5.3	• Documents information about performance or compliance, matching style of writing to purpose and audience • Uses appropriate vocabulary, grammatical structure and organisational conventions to produce required documents
Oral communication	1.5, 5.2	• Presents information or recommendations using language appropriate to the audience • Uses questioning and active listening to seek clarification or confirm understanding
Numeracy	2.2, 2.3, 3.2, 4.1, 4.2, 4.3, 4.4	• Extracts, analyses and synthesises mathematical information embedded in a range of texts • Selects from a range of mathematical and problem solving strategies and techniques to assess or evaluate WHS management data • Uses formal and informal oral and written mathematical language and representation to communicate about risk management, evaluation and monitoring
Navigate the world of work	5.2	• Keeps up to date on changes to WHS legislation or regulations relevant to own role and considers implications of these when negotiating, planning and undertaking work
Interact with others	1.5	• Recognises and applies the protocols governing what to communicate, with whom and how, when working with specialist personnel
Get the work	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.2,	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify relevant

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done	3.3, 4.1, 4.2, 4.3, 4.4, 5.1, 5.2, 5.3	information and risks, and to identify and evaluate alternative strategies and resources • Reviews WHS management using systematic, 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, breaking complex issues into manageable parts • Uses a range of digitally based technology and applications to access and filter data, extract, organise, integrate and share relevant information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS604 Evaluate the WHS performance of organisations	BSBWHS604A Evaluate the WHS performance of organisations	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

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Assessment Requirements for BSBWHS604 Evaluate the WHS performance of organisations

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:

- evaluate the effectiveness of an organisation's arrangements for identifying work health and safety (WHS) hazards including:
  - comparing them with WHS policies and procedures
  - ensuring inclusion of long-latency and low-frequency/high-consequence hazards
  - ensuring inclusion of risks to persons other than workers
  - reviewing outcomes with specialists
- evaluate the effectiveness of an organisation's arrangements for WHS risk management including:
  - appropriateness of risk assessment tools and processes
  - validity and reliability of outcomes
  - inclusion of all major WHS risks
  - suitability and effectiveness of risk controls
  - the relationship between strategic planning and WHS
- evaluate the effectiveness of the organisation's processes for monitoring WHS including:
  - the quality of information and data
  - management's response to issues
- assess the outcomes of the organisation's arrangements for managing WHS including:
  - assessing whether performance indicators, including positive performance indicators (PPIs), provide a true, reliable and timely effectiveness measure
  - comparing differences between reported performance and evidence gathered
  - evaluating and documenting WHS performance outcomes
  - determining whether arrangements have produced improvement
- assess and report on the organisation's WHS compliance with agreed benchmarks and legislation, including:
  - identifying areas of WHS compliance and non-compliance
  - documenting and reporting outcomes to key stakeholders.

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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 Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards, guidance material and links to other relevant legislation, including industrial relations, equal employment opportunity, workers' compensation and rehabilitation
- outline the concept of common law duty of care
- describe the development of WHS performance assessment tools including PPIs
- describe ethics related to professional practice
- outline formal and informal communication and consultation processes, and key personnel related to communication
- summarise the language, literacy and cultural profile of the work team
- describe legal liability in relation to providing advice
- summarise the legislative requirements for WHS information and data, and consultation
- outline the limitations of generic hazard identification and risk assessment checklists, and risk ranking processes
- list methods for collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming such problems
- list methods for providing evidence of compliance with WHS legislation
- describe the nature and use of information and data that provide valid and reliable results on performance of WHS management processes (including PPIs) and limitations of other types of measures
- outline 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
- outline the principles and practices of a systematic approach to managing WHS
- outline the principles of duty of care, including concepts of causation, foreseeability and preventability
- list the principles of effective meetings, including agendas, action planning, chair and secretarial duties, minutes and action items
- list a range of risk analysis and assessment techniques and tools, and their application and limitations
- detail the requirements for recordkeeping that address WHS, privacy and other relevant legislation
- detail the requirements for reporting under WHS and other relevant legislation, including obligations for notification and reporting of incidents
- summarise the requirements under hazard-specific WHS legislation and codes of practice
- describe risk management as a duty of PCBUs or officers under WHS legislation

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- describe the roles and responsibilities, in relation to communication and consultation, for health and safety committees, health and safety representatives, line management, workers and inspectors
- outline sampling methodologies, application and related statistical measures
- list standard industry controls for a range of hazards
- describe techniques, tools and processes for identifying and controlling health and safety hazards and 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.

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 strategic and operational plans, policies and procedures
- WHS information and data
- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Support and facilitate	1.1 Determine the form, content, purposes and functions of a

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ELEMENT	PERFORMANCE CRITERIA
the implementation of a WHSMS	WHSMS appropriate to the organisation and its WHS risks 1.2 Consult effectively with individuals and parties about the form, content, purposes and functions of a WHSMS and its implementation 1.3 Facilitate agreement of individuals and parties to implementing a WHSMS
2 Develop WHS policy and commitment to a WHSMS	2.1 Communicate to individuals and parties the WHS policy requirements and commitment requirements to implement a WHSMS 2.2 Develop and implement an initial WHS review, as required, appropriate to own job role 2.3 Develop WHS policy that meets organisational requirements and is appropriate to the organisation 2.4 Facilitate and support the participation of, and consultation with, individuals and parties in developing and agreeing to WHS policy 2.5 Document WHS policy and communicate it to individuals and parties
3 Develop a WHS plan	3.1 Communicate to individuals and parties the requirements of a WHS plan 3.2 Work with individuals and parties to produce a WHS plan appropriate to the organisation, that meets requirements 3.3 Facilitate and support the participation of, and consultation with, individuals and parties in developing and agreeing to a WHS plan
4 Implement the WHS plan	4.1 Communicate to individuals and parties the WHS plan implementation requirements, as appropriate to the organisation 4.2 Facilitate and support the participation of, and consultation with, individuals and parties in implementing the WHS plan 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
5 Measure and evaluate WHS performance	5.1 Communicate to individuals and parties the measurement and evaluation requirements of the WHS plan as appropriate to the organisation 5.2 Facilitate and support the participation of, and consultation with, individuals and parties in measuring and evaluating WHS performance 5.3 Assess policies, procedures, systems and processes in relation to

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ELEMENT	PERFORMANCE CRITERIA
	their ability to support implementation of the WHS plan, according to own job role
6 Review and improve the WHSMS	6.1 Communicate to individuals and parties the review and improvement requirements of the WHSMS as appropriate to the organisation 6.2 Facilitate and support the participation of, and consultation with, individuals and parties in reviewing and improving the WHSMS 6.3 Document review outcomes and suggested WHSMS improvements, according to own job role and submit to management for consideration

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	• 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	• 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	• 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	• 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

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Navigate the world of work	2.3, 4.1	• Works independently and collectively within broad 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	• 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	• 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

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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

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- 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

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BSBWHS606 Conduct a WHS audit

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 an internal work health and safety (WHS) audit or an external WHS audit under the guidance of a lead auditor.

This unit applies to the auditing of a systematic approach to managing WHS, which may or may not be formalised as part of a WHS management system, and can be against internal or external benchmarks. It involves systematic examination against audit criteria to determine conformance to planned arrangements for the management of WHS.

It applies to personnel required to conduct a WHS audit. A 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.

This unit does not cover evaluation of the organisation’s overall WHS performance, which is addressed in BSBWHS604 Evaluate the WHS performance of organisations.

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

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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 Prepare for a WHS audit	1.1 Define the scope, objectives and benchmarks of the audit 1.2 Identify and obtain relevant documentation, including preliminary material, on the operation of the organisation 1.3 Identify and arrange resources required to conduct the audit 1.4 Assign timing, schedule and responsibilities for the audit
2 Develop a WHS audit plan	2.1 Ensure nature of information and data collected provides valid and reliable evidence of the systematic approach to managing WHS and risk controls within the context of the organisation 2.2 Include key personnel and stakeholders in sources of evidence 2.3 Ensure information and data collection strategies address issues of security, confidentiality, impartiality and equity 2.4 Include opportunities for corroborating evidence in information- and data collection strategies 2.5 Document audit plan and submit to key personnel and stakeholders for consultation and feedback 2.6 Modify audit plan in relation to feedback from key personnel and stakeholders 2.7 Re submit audit plan to key personnel and stakeholders for comment as appropriate 2.8 Negotiate issues concerning audit plan with key personnel and stakeholders, and amend documents where required
3 Select appropriate WHS audit tools	3.1 Ensure audit tools accurately reflect the criteria of the benchmark, nature of risks, identified relevant information and data types 3.2 Ensure audit tools focus on WHS management processes 3.3 Ensure audit tools can be used with consistent outcomes by all members of the audit team 3.4 Ensure audit tools enable collection of evidence in a timely and efficient manner 3.5 Trial audit tools and modify as required
4 Gather information, data and WHS records	4.1 Consult a broad range of workplace personnel during evidence-gathering activities

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ELEMENT	PERFORMANCE CRITERIA
	4.2 Gather information, data and WHS records, compare with the audit plan and identify reasons for discrepancies 4.3 Identify and use alternative methods when required information, data and WHS records are not forthcoming using planned methods 4.4 Check reliability and validity of information, data and WHS records with a number of sources 4.5 Adapt to contingencies as they arise
5 Undertake WHS audit activities	5.1 Undertake preliminary evaluation 5.2 Undertake initial meetings and work site familiarisation 5.3 Monitor progress of the audit plan with key personnel and stakeholders and/or audit team members to ensure resources are being used as planned, and that audit objectives and audit timelines are being achieved 5.4 Progressively document and retain records of information, data and WHS records and findings in an appropriate format 5.5 Report promptly the hazards and risks identified during the audit to key personnel and stakeholders and/or person in control of the workplace 5.6 Address own health and safety during the audit according to organisational requirements and standards for safe work practices and applicable WHS legislation 5.7 Ensure information and data collection and evaluation activities comply with legal requirements and are carried out ethically 5.8 Undertake exit meetings with key personnel and stakeholders as appropriate
6 Report on the outcomes of the WHS audit	6.1 Compare results of the evaluation against audit criteria 6.2 Consult appropriately on evaluation results and develop summary audit findings and recommendations 6.3 Present summary audit findings and recommendations to key personnel and stakeholders at the closing meeting 6.4 Present objective evidence with clear and concise findings, including benefits to be achieved by adoption of the audit recommendations 6.5 Anticipate possible challenges to the report and prepare further explanations to promote acceptance 6.6 Recommend corrective action and follow up processes as required

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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, 3.1, 3.2, 4.2, 4.4, 6.1	• Identifies, interprets and analyses complex legislative and organisational texts relevant to audit requirements
Writing	2.5, 2.5, 2.6, 2.8, 5.4, 5.5, 6.2	• Communicates information about the 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	4.1, 5.2, 5.5, 5.8, 6.2, 6.3, 6.4	• Presents information or ideas using vocabulary appropriate to the audience and context • Uses questioning and active listening to facilitate discussion, seek clarification or confirm understanding
Numeracy	1.4, 4.2, 4.3, 4.4, 6.1, 6.2	• Extracts and evaluates the mathematical information embedded in audit data and records • Applies mathematical processes to set timeframes and compare or contrast data • Uses formal and informal oral and written mathematical language and representation to communicate about the audit plan
Navigate the world of work	2.3, 5.5, 5.6, 5.7	• Understands own legal and ethical rights and responsibilities in relation to the audit • 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 work
Interact with others	4.1, 5.2, 5.3, 5.8, 6.2, 6.3, 6.5	• Recognises and applies the protocols governing what to communicate, with whom and how when gathering evidence, running meetings or 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	1.1-1.4, 2.1-2.8,	• Uses formal, logical planning processes, and an

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done	3.1-3.5, 4.2-4.5, 5.1-5.3, 5.4, 6.1, 6.5, 6.6	increasingly intuitive understanding of context, to plan for the audit • Sequences and schedules complex activities, monitors implementation and manages relevant communication • Considers whether, and how, others should be involved in the selection of audit tools or methods, using consultative or collaborative processes as part of the decision making process, when appropriate • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria • Recognises and anticipates problems, their symptoms and causes, actively looking for early warning signs and implementing contingency plans as required • Uses digital systems and tools to access, record, organise, analyse and display information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS606 Conduct a WHS audit	BSBWHS606A Conduct a WHS audit	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

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Assessment Requirements for BSBWHS606 Conduct a WHS audit

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:

- prepare for a WHS audit including:
  - defining scope, objectives and benchmarks
  - obtaining relevant information
  - arranging resources
  - assigning timing, schedule and responsibilities
- develop a WHS audit plan including:
  - ensuring validity and reliability of evidence
  - incorporating **key personnel and stakeholders**
  - ensuring security, confidentiality, impartiality and equity
  - gathering corroborating evidence
  - documenting the plan
  - getting feedback, modifying and resubmitting the plan for comment
  - negotiating issues and amending as required
- select, develop, trial and modify WHS audit tools ensuring that they:
  - reflect specific requirements
  - focus on WHS management processes
  - can be used consistently by the audit team
  - can be used in timely and efficient manner
- gather information, data and WHS records including:
  - consulting a broad range of workplace personnel
  - identifying reasons for discrepancies
  - using alternative methods when needed
  - checking reliability and validity
  - adapting to any contingencies
- undertake WHS audit activities including:

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  - conducting a preliminary evaluation, initial meetings and work site familiarisation
  - monitoring progress
  - documenting and recording
  - reporting hazards and risks
  - addressing own health and safety
  - ensuring legal and ethical compliance
  - conducting entry and exit meetings
- report on the outcomes of the WHS audit including:
  - comparing results against criteria
  - consulting on results and developing findings and recommendations
  - presenting clear and objective evidence, findings and recommendations, including explanations of benefits
  - recommending further action 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 auditing methods and techniques
- outline commonwealth and state or territory WHS Acts, regulations and codes of practice
- explain development and use of WHS performance assessment tools including positive performance indicators (PPIs)
- outline ethics related to professional practice
- describe formal and informal communication and consultation processes and key personnel related to communication
- identify internal and external sources of WHS information and data, and how to access them
- explain legal liability in relation to providing WHS advice
- summarise methods for collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming such problems
- list methods for providing evidence of compliance with WHS legislation
- describe the nature and use of information and data that provide valid and reliable results on performance of WHS management processes (including PPIs) and limitations of other types of measures
- outline the nature of workplace processes (work flow, planning and control) and hazards relevant to the workplace
- describe organisational behaviour, diversity and culture as they impact on WHS and on change
- identify other functional areas that impact on the management of WHS
- summarise the principles and practices of a systematic approach to managing WHS

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- identify the requirements for recordkeeping that address WHS, privacy and other relevant legislation
- identify standards related to WHS information and data, statistics and records management, including requirements for information and data under elements of systematically managing WHS
- summarise WHS legislative requirements regarding:
  - communication, consultation and participation
  - notification of incidents
  - recordkeeping
  - specific hazard identification and risk assessment methods
- identify WHS legislative responsibilities, duties and obligations of managers, supervisors, workers, and persons conducting businesses or undertakings (PCBUs) or officers.

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:

- organisational documentation, information and data
- workplace policies and procedures
- WHS legislation regulations and codes of practice
- 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

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BSBWHS607 Apply ergonomics to 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 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.

It applies to individuals who manage WHS risks and who need to consider the role ergonomics should play in this process. These individuals will apply advanced practical knowledge to coordinate, facilitate and maintain the WHS program within an organisation. Working with ergonomists may be required as part of this role.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Identify WHS hazards	1.1 Use workplace WHS information to identify WHS hazards and

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ELEMENT	PERFORMANCE CRITERIA
and risks whose management could include the application of ergonomics	risks 1.2. Apply knowledge of ergonomics principles, processes and methods to identify workplace **WHS hazards and risks** whose management could include the application of ergonomics
2 Use ergonomics to address WHS issues	2.1 Apply ergonomics principles, processes and methods in the assessment of WHS risks 2.2. Apply ergonomics principles, processes and methods in the development of risk controls 2.3. Apply ergonomics principles, processes and methods in the evaluation of risk controls
3 Apply ergonomics in WHS-related planning and design activities	3.1 Identify **WHS related planning and design activities and processes** 3.2. Identify opportunities for the application of ergonomics principles, processes and methods to enhance WHS related planning and design activities 3.3. Apply ergonomics principles, processes and methods to enhance WHS related planning and design activities 3.4. Review and evaluate enhancements to WHS related planning and design activities
4 Ensure ergonomics activities are compliant and appropriate	4.1 Ensure ergonomics activities comply with all applicable WHS legislation, regulations, codes of practice and **other relevant documents** 4.2 Ensure ergonomics activities comply with relevant workplace processes, procedures, standards and systems 4.3 Apply appropriate ergonomics principles, processes and methods according to available resources and own role, responsibilities, skill and knowledge 4.4 Seek advice, support and input from **specialists** where necessary and 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	Description

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	Criteria	
Reading	1.1, 1.2, 3.4, 4.1, 4.2	• Identifies, interprets and analyses complex legislative and organisational texts relevant to ergonomic activities
Writing	2.1, 2.2, 2.3, 3.3, 3.4	• Communicates information about ergonomic principles, processes and methods, matching style of writing to purpose and audience • Drafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions
Oral communication	4.4	• Uses questioning and active listening to seek information and confirm understanding
Navigate the world of work	4.1, 4.2, 4.3	• Understands own responsibilities regarding ergonomic activities in WHS compliance contexts • 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 work • Understands the nature and purpose of own role and associated responsibilities, and how it contributes to the work of others in the immediate work context when applying ergonomics
Interact with others	4.4	• Selects and uses appropriate conventions and protocols to build and cultivate relationships with external people who can provide specialist support
Get the work done	1.1, 1.2, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 3.4	• Uses logical planning processes, and an increasingly intuitive understanding of context, to identify instances where ergonomics can be applied in the workplace • 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, identifying and evaluating options against agreed criteria, and seeking input and advice from others before taking action, when necessary • Recognises the potential of new approaches to apply ergonomics to enhance work practices and outcomes • Uses digital systems and tools to access, record, organise, analyse and display information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS607 Apply ergonomics to manage WHS risks	BSBWHS607A Apply ergonomics to manage WHS hazards and risks	Updated to meet standards for Training Packages Minor edits to clarify title and performance criteria	Equivalent unit

Links

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

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Assessment Requirements for BSBWHS607 Apply ergonomics to 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:

- identify work health and safety (WHS) hazards and manage associated risks where ergonomics can be applied through:
  - using workplace WHS information
  - using knowledge of ergonomics principles, processes and methods
- use ergonomics principles, processes and methods to address WHS risk management
- apply ergonomics in WHS related planning and design activities including:
  - identifying opportunities for enhancement through ergonomics
  - enhancing activities and evaluating changes
- ensure ergonomics activities are compliant and appropriate including:
  - legislative compliance
  - organisational compliance
  - appropriateness to available resources and own role and capabilities
  - seeking specialist input where necessary and appropriate.

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:

- define 'ergonomics' and outline the application domains of ergonomics
- broadly outline the knowledge base, skills, methods, techniques, expertise, roles and functions of ergonomists
- outline ergonomics principles, processes and methods applicable to the management of WHS hazards and risks, and WHS related planning and design activities and processes

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- identify ergonomics related content of applicable WHS legislation, regulations, codes of practice and other documents, such as policies, standards, guidance publications and alerts issued by the relevant WHS regulators
- summarise the general principles and processes of ergonomics
- outline the scope and broad content of Australian and international ergonomics standards
- describe systems and systems concepts as used in ergonomics.

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:

- relevant WHS legislation, standards, guidelines, information and data
- reports from other parties consulted in developing ergonomics interventions
- 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

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BSBWHS608 Assist with applying occupational hygiene to 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 assist with the application of occupational hygiene principles, knowledge and techniques to manage work health and safety (WHS) risks.

It includes understanding how occupational hygiene contributes to WHS management, the appropriate application of occupational hygiene knowledge, skills and techniques and working with occupational hygienists and other specialists.

This unit applies to individuals who assist with applying occupational hygiene to manage WHS risks. Individuals who are required to assist with the monitoring of a range of physical agents and/or conditions in the workplace should use BSBWHS409 Assist with workplace monitoring processes.

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

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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 Identify WHS hazards and risks to be addressed by occupational hygiene	1.1 Use workplace WHS information to identify WHS hazards and risks 1.2 Apply knowledge of occupational hygiene principles, knowledge, skills and techniques to identify workplace WHS hazards and risks to be addressed by occupational hygiene 1.3 Identify situations where WHS specialists and other advisers may be required
2 Assist with the assessment of identified risks	2.1 Assist with determining sources of exposure to identified hazards and risks 2.2 Assist with selecting occupational hygiene equipment and techniques for assessing identified risks 2.3 Assist with using occupational hygiene equipment and applying techniques 2.4 Assist with analysing and interpreting results of assessments, including the use of exposure standards 2.5 Assist with reporting the results of assessments, interpretations and recommendations to individuals and parties 2.6 Assist with ensuring reporting is understandable and that format, form and content meet the needs of individuals and parties
3 Assist with the design and implementation of risk controls	3.1 Apply the hierarchy of control when assisting with the design of risk-control strategies 3.2 Assist with identifying problems with existing risk controls and providing remedial advice 3.3 Assist with developing, selecting and implementing risk controls and ensuring effective consultation with, and participation of, individuals and parties 3.4 Access external sources of information and data, WHS specialists and other advisers as required, about the nature and level of health hazards, risks and risk controls
4 Assist with monitoring, evaluating and modifying risk controls	4.1 Assist with monitoring and evaluating risk controls in consultation with individuals and parties 4.2 Assist with modifying risk controls in consultation with individuals and parties

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ELEMENT	PERFORMANCE CRITERIA
	4.3 Identify and document training needs associated with risk controls and arrange training in consultation with individuals and parties 4.4 Assist with making recommendations about future risk controls as a result of evaluation and monitoring
5 Ensure occupational hygiene activities are appropriate	5.1 Ensure occupational hygiene activities comply with all applicable WHS legislation, regulations and codes of practice 5.2 Ensure occupational hygiene activities comply with relevant organisational and workplace 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 WHS specialists and other advisers where necessary and 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	1.1, 1.2, 2.1, 2.4, 2.5, 2.6, 3.4, 4.4, 5.1, 5.2	• Identifies, interprets and analyses complex legislative and organisational texts relevant to occupational hygiene activities
Writing	2.5, 2.6, 4.4	• Reports on assessments and recommendations about occupational hygiene, matching style of writing to purpose and audience • Drafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions
Oral communication	3.3, 4.1, 4.2, 4.3, 5.4	• Presents information or ideas using language appropriate to the audience • Uses questioning and active listening to seek information and confirm understanding
Numeracy	2.3, 2.4, 2.5	• Uses equipment to take measurements • Selects from, and applies, a range of mathematical

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		strategies to interpret and analyse measurements • Uses formal and informal oral and written mathematical language and representation to communicate test results
Navigate the world of work	5.1, 5.2, 5.3	• Understands own responsibilities regarding occupational hygiene activities in WHS compliance contexts • 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 work • Understands the nature and purpose of own role and associated responsibilities, and how it contributes to the work of others in occupational hygiene contexts
Interact with others	2.5, 2.6, 3.3, 3.4, 4.1, 4.2, 4.3, 5.4	• 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, in the context of consultation • Selects and uses appropriate conventions and protocols to build and cultivate relationships with external people who can provide specialist support
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 3.3, 4.1, 4.2, 4.3, 4.4, 5.3	• Uses logical planning processes, and an increasingly intuitive understanding of context, in identifying and managing risks to be addressed by occupational hygiene • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria, seeking input and advice from others before taking action, when necessary • Recognises the potential of new approaches to enhance 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWHS608 Assist	BSBWHS608A Assist	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
with applying occupational hygiene to manage WHS risks	with applying occupational hygiene to manage WHS hazards and risks	Standards for Training Packages Minor edits to clarify title and performance criteria	

Links

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

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Assessment Requirements for BSBWHS608 Assist with applying occupational hygiene to 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:

- identify work health and safety (WHS) hazards and risks to be addressed by occupational hygiene through:
  - using workplace WHS information
  - using knowledge of occupational hygiene principles, knowledge, skills and techniques
  - identifying situations requiring specialists
- assist with the assessment of identified WHS hazards and risks including:
  - determining sources of exposure
  - identifying and using occupational hygiene equipment and techniques
  - analysing and interpreting results of assessments
  - reporting results, interpretations and recommendations
- assist with the design and implementation of risk controls including:
  - applying the hierarchy of control
  - identifying and advising on remediating problems with existing controls
  - ensuring participation and consultation
  - accessing external sources of information and specialist advice
- assist with monitoring, evaluating and modifying risk controls including:
  - consulting others
  - addressing related training needs
  - making recommendations about future risk controls
- ensure occupational hygiene activities are legislatively and organisationally compliant and appropriate:
  - according to resources, role and capabilities
  - seeking specialist advice as needed.

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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 common controls for a range of hazards and associated risks, their effectiveness and their limitations
- describe how occupational hygienists work with WHS personnel, individuals and parties in the workplace to control WHS risks
- outline organisational and workplace WHS policies, procedures, processes and systems
- explain key concepts and processes including:
  - occupational hygiene assessments and investigations
  - characteristics of WHS hazards and risks addressed by occupational hygiene, their effects on people and how these effects occur
  - exposure standards, and other standards and guidelines used in occupational hygiene, including their limitations and practical applications
  - how recommendations for occupational hygiene risk controls are developed, implemented and evaluated
  - nature and scope of risk controls, including the hierarchy of control in relation to occupational hygiene
  - occupational hygiene principles, knowledge, skills, techniques and methodologies
  - roles and functions of occupational medicine physicians, other medical doctors and toxicologists
  - sources and routes of exposure of hazards and risks addressed by occupational hygiene
  - training, education, roles, functions and skills of occupational hygienists
  - types, purposes, functions and use of occupational hygiene equipment
  - summarise the requirements for individual training and instruction in the fitting, use, maintenance and storage of a range of personal protective equipment (PPE)
- summarise the requirements for selection and limitations of use of PPE
- define risk management as a duty of persons conducting businesses or undertakings (PCBUs) or officers under WHS legislation
- identify sources of occupational disease and their prevention
- outline WHS Acts, regulations and codes of practice with particular relevance to occupational hygiene
- outline workplace processes, activities, jobs and tasks relevant to occupational hygiene.

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:

- relevant legislation, standards and guidelines

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- occupational hygiene equipment that meets relevant standards for function and performance
- relevant workplace policies and procedures
- 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

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BSBWHS609 Advise on the application of safe design principles to control 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 advise on applying safe design principles to control Work Health and Safety (WHS) risks during a product's life cycle. 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.

It applies to individuals who are in a position to provide advice on the application of safe design principles in their organisation, which may be involved in one or more stages of the product life cycle.

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
Elements describe the	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
essential outcomes.	*demonstrate achievement of the element.*
1 Advise on WHS requirements of the design process	1.1 Inform decision makers about their responsibility for the safety of downstream users 1.2 Advise decision makers of their duties, under Commonwealth and state or territory WHS legislation, to manage WHS risks, and control for residual WHS risks, at each product life cycle stage 1.3 Promote WHS within the design requirements and the inclusion of a WHS risk assessment across the product life cycle 1.4 Source and make available to decision makers the most current information and data on WHS principles, materials, technology and systems for application in product design 1.5 Identify and make available required education and training to enable decision makers to manage WHS risks in the design phase 1.6 Identify and access relevant sources of information and data 1.7 Consult known and/or potential users of the product during the design phase 1.8 Identify situations where specialist and other advisers may be required
2 Advise on the development of a systematic WHS hazard identification and WHS risk assessment system for safe design	2.1 Advise on the identification of WHS hazards and WHS risk assessment across the life cycle of the designed product 2.2 Advise on the selection and implementation of the most appropriate WHS risk controls for the designed product from a systematic risk analysis arising from exposure to identified WHS hazards 2.3 Advise on ensuring WHS risk management includes potential alterations to the designed product during its life 2.4 Advise on documenting decision making during the WHS risk-assessment process and making documentation accessible to all parties 2.5 Advise on the establishment of a residual WHS risk register and the distribution of this information to those involved in the downstream or subsequent life-cycle stages 2.6 Advise on monitoring the design as it evolves, to identify potential new WHS hazards and risks and to manage any WHS hazards and risks

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ELEMENT	PERFORMANCE CRITERIA
3 Advise on the principles of WHS risk controls	3.1 Use the hierarchy of control to advise on WHS risk controls in design 3.2 Advise on minimising the impact of possible failure or defect by ensuring the product includes fail-to-safe action
4 Advise on consultation processes in the life cycle of the designed product	4.1 Advise decision makers to consider the needs of the range of people who will use or interact with the designed product 4.2 Advise on arranging consultation between all parties during the concept and detailed design phases to identify WHS hazards and control WHS risks 4.3 Advise on appropriately communicating residual WHS risks in the designed product to those who will use or interact with the product throughout its life cycle
5 Advise on procurement systems to minimise 'purchased' WHS hazards and risks	5.1 Advise decision makers involved in purchasing and contractual arrangements to include a requirement to identify WHS hazards, control WHS risks, and provide information and data on residual WHS risks 5.2 Advise on including an agreement to carry out a safe design approach in the design brief or draft specifications

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, 1.5, 1.6	• Identifies, interprets and analyses complex legislative and organisational texts relevant to safe design
Writing	1.1, 1.2, 1.3, 2.1, 2.4, 2.5	• Develops advice and recommendations about safe design, matching style of writing to purpose and audience • Drafts and develops a range of documents using appropriate vocabulary, grammatical structure and organisational conventions
Oral communication	1.1, 1.2, 1.3, 1.6, 1.7, 2.1-2.6, 3.1, 3.2, 4.1-4.3, 5.1, 5.2	• Presents information or advice using language appropriate to the audience • Uses questioning and active listening to seek information and confirm understanding

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Numeracy	2.1, 2.2	• Selects from, and applies, a range of mathematical strategies to interpret and analyse mathematical information embedded in a range of texts • Applies mathematical processes to assess risk levels • Uses formal and informal oral and written mathematical language and representation to communicate advice on WHS risk management in product design
Navigate the world of work	1.1, 1.2	• Understands legal responsibilities across WHS product design compliance contexts • Keeps up to date on changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these when advising on compliance
Interact with others	1.1, 1.2, 1.3, 1.6, 1.7, 2.1-2.6, 3.1, 3.2, 4.1- 4.3, 5.1, 5.2	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience and monitoring impact when providing advice • 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
Get the work done	1.5, 1.6, 1.8, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 4.3	• Uses logical planning processes, and an increasingly intuitive understanding of context, to organise training and identify specialist needs • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria, seeking input and advice from others before taking action, when necessary • Recognises the potential of new approaches to product life cycle risk management to enhance work practices and outcomes • Uses digital systems and tools to access, record, organise, analyse, display and share information

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.

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Hierarchy of control must include:	Eliminating the hazard or risk and where this is not practicable minimising risk by: • substitution of the hazard • isolating the hazard from personnel • using engineering controls • using administrative controls (for example procedures and training) • using personal protective equipment (PPE).

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWHS609 Advise on the application of safe design principles to control WHS risks	BSBWHS609A Advise on the application of safe design principles to control WHS risks	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

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Assessment Requirements for BSBWHS609 Advise on the application of safe design principles to control 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:

- advise on work health and safety (WHS) requirements of design processes including:
  - advising decision makers on responsibilities and legal duties, including WHS risk management, and control for residual WHS risks, at product life cycle stages
  - promoting WHS in design requirements and WHS risk control across product life cycle
  - making available current WHS product design information
  - making available education and training for design phase WHS risk management
  - consulting known and potential users
  - identifying situations where specialists or advisers may be required
- advise on the development of a systematic WHS risk management system for safe design including giving advice on:
  - hazard identification, risk assessment and risk control
  - ensuring risk management includes potential alterations to the product during its life
  - documentation and accessibility of decision making
  - establishment and downstream distribution of a residual risk register
  - monitoring of evolving design
- advise on the principles of WHS risk controls:
  - based on the hierarchy of control
  - ensuring inclusion of fail safe action
- advise on consultation processes in the life cycle of the designed product including giving advice on:
  - consideration of users' needs
  - consultation during concept and design phases in relation to WHS risk management
  - communication of residual life cycle risk
- advise on procurement systems to minimise ‘purchased’ WHS hazards and risks including giving advice on:

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- inclusion of risk management requirement and provision of residual risk information
- inclusion of agreement to carry out a safe design approach in the design brief or draft specifications.

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 basic human cognitive and perceptual capabilities and other basic and fundamental factors relevant to the design of human machine interfaces
- outline basic information about relevant psychosocial factors, occupational violence, shift work, repetitive work, awkward postures, lighting, thermal environment and work layout
- outline the basics of anthropometry and biomechanics
- summarise commonwealth and state or territory WHS Acts, regulations and codes of practice and other relevant publications and guidelines relating to information and data, consultation, participation and safe design including:
  - Safe Work Australia, Guidance on the principles of safe design for work
  - Safe Work Australia, Model Code of Practice: Safe design of structures
- give examples of direct and indirect factors that impact on WHS and the environment in the design of products
- outline formal and informal communication and consultation processes and key personnel related to communication
- detail the hierarchy of control and criteria for choosing between different WHS risk controls
- outline internal and external sources of WHS information and data and how to access them
- identify key personnel, including change agents, within workplace management structure
- outline legal liability in relation to providing advice
- describe organisational behaviour and culture as they impact on WHS and on change
- summarise pertinent sections of relevant Australian, and other, standards
- explain risk management and the principles and practices of a systematic approach to managing WHS
- outline the WHS legislative duties of PCBUs or officers who are designers to eliminate hazards at the design stage.

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:

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- reports from other parties consulted, in developing appropriate interactions between people involved in the life cycle of the designed product
- relevant legislation, standards, guidelines, research or industry data
- 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

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BSBWOR201 Manage personal stress in the workplace

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 signs and sources of stress within the broader framework of the job role and work environment.

It applies to individuals who usually work with some guidance and supervision in an environment where they are likely to encounter difficult customers and situations from time to time. It typically applies in a contact centre environment owing to the very measured, structured, high volume and potentially repetitive nature of the work, but can apply in any work environment.

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

Unit Sector

Industry Capability – Workplace Effectiveness

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. Develop personal awareness of stress	1.1 Recognise signs and sources of stress 1.2 Acknowledge stress and difficult situations 1.3 Analyse and understand potential areas of stress in the work environment
2. Develop stress	2.1 Develop an effective understanding of a range of stress

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ELEMENT	PERFORMANCE CRITERIA
management techniques	management techniques 2.2 Use appropriate techniques to manage stressful situations effectively 2.3 Focus on areas of stress within personal control 2.4 Adopt strategies to effectively reduce, manage and deal with stress
3. Manage time	3.1 Develop and understand job role priorities 3.2 Develop techniques to support achievement of key performance indicators (KPIs) and priorities 3.3 Use appropriate time management tools and techniques 3.4 Regularly evaluate tools and techniques 3.5 Promptly identify and inform relevant personnel of any variations and difficulties affecting work requirements, through regular reviews
4. Recover from a stressful contact	4.1 Review the contact or situation 4.2 Analyse root cause/s of stressful contact or situation 4.3 Depersonalise context of contact or situation 4.4 Discuss outcomes with appropriate staff members 4.5 Prepare for next contact or situation positively 4.6 Follow up or take action where needed
5. Maintain personal stamina and resilience	5.1 Identify sources of fatigue in contact centre role 5.2 Adopt work routine and procedural strategies to minimise stress and fatigue 5.3 Monitor personal performance against performance requirements 5.4 Adapt stamina management strategies to maximise performance 5.5 Seek assistance from team members and management in managing stamina
6. Maintain work/life balance	6.1 Identify work/life priorities 6.2 Adopt strategies to support work/life priorities 6.3 Give high priority to health and wellbeing 6.4 Monitor work/life balance 6.5 Develop ability to effectively leave work behind at the end of

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ELEMENT	PERFORMANCE CRITERIA
	the day

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	3.1-3.5	• Recognises and interprets textual information to determine job role and requirements
Writing	3.3, 3.4, 3.5	• Completes time management documentation using organisational formats
Oral Communication	3.5, 4.4, 5.5	• Participates in discussions using clear language and features appropriate to audience • Uses listening and questioning techniques to request assistance and confirm understanding
Navigate the world of work	3.1, 3.2, 5.3	• Understands role requirements and identifies own responsibilities
Interact with others	3.5, 4.4, 5.5	• Establishes rapport and builds relationships with team members and others • Maintains awareness of own strengths and weaknesses to support an overall sense of wellbeing
Get the work done	1.3, 2.1, 2.4, 3.1-3.4, 4.1-4.3, 4.5, 4.6, 5.1-5.4, 6.1, 6.2, 6.4, 6.5	• Plans and organises tasks to achieve outcome within timeframes • Uses analytical skills to decide on effective techniques to manage stress and personal well-being • Uses problem-solving skills to address a range of issues, seeking advice of others, where necessary • Monitors implementation of solutions and reflects on outcomes

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWOR201 Manage personal stress in the workplace	BSBWOR201A Manage personal stress in the workplace	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

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Assessment Requirements for BSBWOR201 Manage personal stress in the workplace

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 and understand potential stress in the work environment
- develop and use techniques and strategies to manage stress and stressful situations
- adopt and monitor potential sources of stress and fatigue, seeking assistance as required
- monitor own performance against performance requirements and key performance indicators (KPIs)
- use techniques to achieve work/life balance.

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 job role priorities and KPIs
- list internal and external sources of assistance, including escalation pathways
- outline signs and sources of existing and potential stress or difficult situations
- discuss stress management and reduction techniques
- describe time management tools and techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – workplace effectiveness field of work and include access to:

- office equipment and resources
- time management tools

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- workplace documentation
- 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

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BSBWOR202 Organise and complete daily work activities

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 seek feedback for performance improvement and use current technology appropriate to the task.

It applies to individuals working under direct supervision who develop basic skills and knowledge for working in a broad range of settings.

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

Unit Sector

Industry Capability – Workplace Effectiveness

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. Organise work schedule	1.1 Discuss and agree on work goals and plans with assistance from appropriate persons 1.2 Develop an understanding of the relationship between individual work goals and plans, and organisational goals and plans 1.3 Plan and prioritise workload within allocated timeframes
2. Complete work tasks	2.1 Complete tasks within designated timelines and in accordance with organisational requirements and instructions

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Use effective questioning to seek assistance from colleagues when difficulties arise in achieving allocated tasks 2.3 Identify factors affecting work requirements and take appropriate action 2.4 Use business technology efficiently and effectively to complete work tasks 2.5 Communicate progress on task to supervisor or colleagues as required
3. Review work performance	3.1 Seek feedback on work performance from supervisors or colleagues 3.2 Monitor and adjust work according to feedback obtained through supervision and comparison with established team and organisational standards 3.3 Identify and plan opportunities for improvement in liaison with colleagues

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, 3.2	• Recognises and interprets textual information to determine and adhere to organisational and task requirements
Writing	1.3, 2.5, 3.3	• Completes required documents using organisational formats
Oral Communication	1.1, 2.1, 2.2, 2.5, 3.1	• 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	1.3, 2.1	• Interprets numerical information related to timeframes
Navigate the world of work	1.2, 2.1, 3.2	• Complies with organisational policies, procedures and standards
Get the work	1.1, 1.3, 2.1-2.4, 3.2,	• Prioritises work and completes activities within designated timeframes

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done	3.3	• Identifies and solves routine problems • Selects and uses appropriate digital tools to complete tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR202 Organise and complete daily work activities	BSBWOR202A Organise and complete daily work activities	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

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Assessment Requirements for BSBWOR202 Organise and complete daily work activities

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 and organise workload with the assistance of others
- complete tasks, using appropriate digital tools, within specified timelines seeking assistance as required
- use effective communication skills to seek assistance or feedback from others
- seek and use feedback from others to monitor and improve work 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:

- outline the organisational standards, policies and procedures that relate to own work role
- explain the relationship between an individual's work goals and plans and the organisation's goals and plans
- list some factors that can affect the ability to get work done, and explain the action to take
- explain how to plan and manage time.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – workplace effectiveness field of work and include access to:

- office equipment and resources
- workplace documentation
- case studies and, where possible, real situations
- interaction with others.

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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

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BSBWOR203 Work effectively with others

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 cooperatively with others and deal effectively with issues, problems and conflict.

It applies to individuals who perform a range of routine tasks using a limited range of practical skills, and a fundamental 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

Industry Capability – Workplace Effectiveness

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. Develop effective workplace relationships	1.1 Identify own responsibilities and duties in relation to workgroup members and undertake activities in a manner that promotes cooperation and good relationships 1.2 Take time and resource constraints into account in fulfilling work requirements of self and others 1.3 Encourage, acknowledge and act on constructive feedback provided by others in the workgroup

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ELEMENT	PERFORMANCE CRITERIA
2. Contribute to workgroup activities	2.1 Provide support to team members to ensure workgroup goals are met 2.2 Contribute constructively to workgroup goals and tasks according to organisational requirements 2.3 Share information relevant to work with workgroup to ensure designated goals are met 2.4 Identify and plan strategies/opportunities for improvement of workgroup in liaison with workgroup
3. Deal effectively with issues, problems and conflict	3.1 Respect differences in personal values and beliefs and their importance in the development of relationships 3.2 Identify any linguistic and cultural differences in communication styles and respond appropriately 3.3 Identify issues, problems and conflict encountered in the workplace 3.4 Seek assistance from workgroup members when issues, problems and conflict arise and suggest possible ways of dealing with them as appropriate or refer them to the appropriate person

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	• Identifies and interprets information to determine task requirements
Writing	2.3, 2.4	• Completes required documentation using organisational formats • Composes simple documents for others to read
Oral Communication	1.3, 3.2, 3.4	• 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
Numeracy	1.2	• Interprets information related to timeframes and resource quantities

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Navigate the world of work	1.1, 2.2	• Understands responsibilities of own role and follows explicit and implicit organisational protocols and procedures
Interact with others	1.1, 1.3, 2.1-2.4, 3.1, 3.2, 3.4	• 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
Get the work done	1.2, 2.4, 3.3, 3.4	• Plans and organises work commitments to ensure deadlines and objectives are met • Uses formal analytical thinking techniques to recognise and respond to routine problems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR203 Work effectively with others	BSBWOR203A Work effectively with others	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

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Assessment Requirements for BSBWOR203 Work effectively with others

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 own responsibilities in relation to the team and the organisation's requirements
- work effectively in a workgroup including:
  - supporting team members
  - using culturally appropriate communication skills
  - acting on constructive feedback
  - cooperating and contributing to team goals
  - identifying improvement opportunities
- identify problems and conflicts and address them 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:

- outline the organisational standards, policies and procedures that relate to own work role
- outline team responsibilities and duties and their relationship to individual responsibilities and duties.
- summarise conflict resolution techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – workplace effectiveness field of work and include access to:

- office equipment and resources

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- workplace documentation
- 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

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BSBWOR204 Use business 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 select and use computer software and organise electronic information and data.

It applies to individuals who apply 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

Industry Capability – Workplace Effectiveness

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. Select and use technology	1.1 Select appropriate technology and software applications to achieve requirements of the task 1.2 Adjust workspace, furniture and equipment to suit user's ergonomic requirements 1.3 Use technology according to organisational requirements and in a way that promotes a safe work environment
2. Process and organise	2.1 Identify, open, generate or amend files and records according

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ELEMENT	PERFORMANCE CRITERIA
data	to task and organisational requirements 2.2 Operate input devices according to organisational requirements 2.3 Store data appropriately and exit applications without damage to or loss of, data 2.4 Use manuals, training booklets and/or online help or helpdesks to overcome basic difficulties with applications
3. Maintain technology	3.1 Identify and replace used technology consumables in accordance with manufacturer's instructions and organisational requirements 3.2 Carry out and/or arrange routine maintenance to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements 3.3 Identify equipment faults accurately and take action in accordance with manufacturer's instructions or report fault to designated person

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, 2.1, 2.2, 2.4, 3.1-3.3	• Recognises and interprets information from familiar sources to determine job role and task requirements
Writing	2.1, 2.3, 3.2, 3.3	• Produces and amends files to meet task and organisational requirements • Completes required documentation using organisational formats
Oral Communication	3.3	• Uses specific and relevant language to refer faults to others
Navigate the world of work	1.2, 1.3, 2.1, 2.2, 3.1-3.3	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Get the work done	1.1, 1.3, 2.1-2.4, 3.1-3.3	• Uses business technologies and systems safely, when gathering, storing, accessing and sharing information • Understands purposes, specific functions and key

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		features of common digital systems and business tools • Operates digital systems and business tools effectively to complete routine tasks using some basic troubleshooting strategies as required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR204 Use business technology	BSBWOR204A Use business 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

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Assessment Requirements for BSBWOR204 Use business 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:

- select and use technology safely and according to organisational requirements
- access, retrieve and store required data
- demonstrate basic maintenance on a range of equipment using manuals or help-files
- identify and address faults according to 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 the organisation's work health and safety requirements
- outline the organisation's requirements for file naming and storage
- explain why regular back-ups of data are done
- list 'routine maintenance' tasks
- summarise the procedure for addressing equipment faults.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – workplace effectiveness field of work and include access to:

- office equipment and resources
- electronic files and data
- workplace documentation and equipment manuals
- case studies and, where possible, real situations

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- 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

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BSBWOR301 Organise personal work priorities and development

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 organise own work schedules, to monitor and obtain feedback on work performance and to maintain required levels of competence.

This 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

Industry Capability – Workplace Effectiveness

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. Organise and complete own work schedule	1.1 Ensure that work goals, objectives or Key Performance Indicators (KPIs) are understood, negotiated and agreed in accordance with organisational requirements 1.2 Assess and prioritise workload to ensure tasks are completed within identified timeframes 1.3 Identify factors affecting the achievement of work objectives and incorporate contingencies into work plans 1.4 Use business technology efficiently and effectively to manage

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ELEMENT	PERFORMANCE CRITERIA
	and monitor scheduling and completion of tasks
2. Monitor own work performance	2.1 Accurately monitor and adjust personal work performance through self assessment to ensure achievement of tasks and compliance with legislation and work processes or KPIs 2.2 Ensure that feedback on performance is actively sought and evaluated from colleagues and clients in the context of individual and group requirements 2.3 Routinely identify and report on variations in the quality of and products and services according to organisational requirements 2.4 Identify signs of stress and effects on personal wellbeing 2.5 Identify sources of stress and access appropriate supports and resolution strategies
3. Co-ordinate personal skill development and learning	3.1 Identify personal learning and professional development needs and skill gaps using self assessment and advice from colleagues and clients in relation to role and organisational requirements 3.2 Identify, prioritise and plan opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel 3.3 Access, complete and record professional development opportunities to facilitate continuous learning and career development 3.4 Incorporate formal and informal feedback into review of further learning needs

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	3.1-3.4	• Employs a range of approaches and investigative techniques to source the knowledge necessary to arrange personal learning experiences
Reading	1.1, 1.2, 2.1	• Interprets textual information to determine organisation's procedures, own work performance and objectives

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Writing	1.3, 1.4, 2.3, 3.1, 3.2, 3.3	• Prepares written reports and workplace documents that communicate information clearly and effectively
Oral Communication	2.2, 2.3, 3.1, 3.2	• Clearly gives and receives feedback using specific and relevant language • Uses listening and questioning techniques to confirm understanding
Numeracy	1.1, 1.3	• Understands responsibilities and scope of role and complies with organisational policies, procedures and protocols
Interact with others	1.1, 2.2, 2.3, 3.1, 3.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Fosters and nurtures a culture of constructive and respectful feedback • Proactively collaborates with others to achieve specific goals
Get the work done	1.2, 1.3, 1.4, 2.4, 2.5, 3.2	• Plans and organises work commitments to ensure deadlines and objectives are met • Uses formal analytical thinking techniques to recognise and respond to routine problems • Uses digital systems and tools to enter, store and monitor information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR301 Organise personal work priorities and development	BSBWOR301B Organise personal work priorities and development	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

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Assessment Requirements for BSBWOR301 Organise personal work priorities and development

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:

- prepare a work plan according to organisational requirements and work objectives
- use business technology to schedule, prioritise and monitor completion of tasks in a work plan
- assess and prioritise own work load and deal with contingencies
- monitor and assess personal performance against job role requirements by seeking feedback from colleagues and clients
- identify personal development needs and access, complete and record skill development and learning.

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 provisions of legislation that relate to own work role
- describe goals, objectives or key performance indicators of own work role
- explain ways to elicit, analyse and interpret feedback when communicating with other people in the workplace
- explain the principles and techniques of goal setting, measuring performance, time management and personal assessment of learning and development needs
- explain signs and sources of stress and strategies to deal with stress in the workplace
- identify methods to identify and prioritise personal learning needs.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability - workplace effectiveness field of work and include access to:

- office equipment and resources
- work schedules and performance improvement plans
- workplace documentation and resources
- 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

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BSBWOR302 Work effectively as an off-site worker

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 negotiate and perform self-managed, self-directed and agreed work. It is a flexible employment option that meets all legal and regulatory employment requirements.

It applies to individuals who are skilled operators and apply a broad range of competencies in various off-site contexts. Most commonly this will apply to people working from home or another location away from a central office.

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

Unit Sector

Industry Capability – Workplace Effectiveness

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. Negotiate off-site working arrangements	1.1 Identify and include legal and ethical issues relating to off-site work in working arrangements 1.2 Identify and include worker rights and responsibilities and those of supervisor/s and the organisation, in off-site working arrangements 1.3 Agree and document off-site work employment conditions and agreement in accordance with legal requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Confirm equipment and technology requirements for off-site work, and agree and document supply and maintenance arrangements in accordance with legal and organisational requirements 1.5 Confirm supervisory and performance management arrangements and agree to requirements for any on-site work, meetings or events in accordance with off-site work policy and practices
2. Organise off-site work environment	2.1 Identify requirements for a safe, effective off-site work environment in consultation with management 2.2 Obtain equipment and technology for off-site work environment in accordance with work agreement 2.3 Arrange off-site work environment in accordance with work health and safety (WHS) requirements and work agreement
3. Plan off-site work schedules	3.1 Establish work objectives and priorities in consultation with management 3.2 Analyse and incorporate work requirements into personal work schedules 3.3 Identify factors affecting achievement of work objectives and address contingencies in work schedules
4. Complete off-site work	4.1 Complete or revise work schedules in accordance with organisational requirements 4.2 Schedule and attend on-site work, meetings or events in accordance with organisational requirements 4.3 Seek assistance regarding breakdowns in work arrangements, equipment or technology and adjust work schedules in accordance with organisational requirements 4.4 Ensure work practices meet WHS requirements and terms of the work agreement
5. Monitor and improve off-site work performance	5.1 Monitor personal performance against work requirements and schedules and identify any areas for improvement 5.2 Obtain feedback from colleagues and clients, and analyse in context of personal and organisational objectives 5.3 Evaluate off-site work processes and systems for their usefulness in assisting work outcomes and make recommendations for improvement in accordance with organisational requirements 5.4 Negotiate changes to off-site work practices and implement in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational requirements and work agreement

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, 4.1-4.4, 5.2-5.4	• Interprets information from a range of sources to determine organisation's procedures, own work goals and objectives
Writing	1.3-1.5, 2.1, 3.1-3.3, 4.1-4.3, 5.2-5.4	• Prepares reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	1.3-1.5, 2.1, 3.1, 4.3, 5.2, 5.4	• Explains ideas clearly using appropriate vocabulary and features • Uses listening and questioning techniques to seek information and confirm understanding
Navigate the world of work	1.1-1.5, 2.3, 4.4	• Understands nature and purpose of own role and associated responsibilities • Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	2.1, 3.1, 4.3, 5.4	• Consults with others to ensure workplace is safe and seeks assistance when required • Collaborates and cooperates with others to negotiate acceptable outcomes
Get the work done	1.1, 1.4, 1.5, 2.1-2.3, 3.1-3.3, 4.1-4.3	• Organises work priorities and arrangements to meet deadlines • Identifies and solves routine problems • Identifies and uses appropriate equipment and technology for requirements of the task

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWOR302 Work effectively as an off-site worker	BSBWOR302A Work effectively as an off-site worker	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

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Assessment Requirements for BSBWOR302 Work effectively as an off-site worker

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:

- negotiate off-site working arrangements
- identify and consider appropriate legal and organisational requirements that impact the business agreement
- plan personal work schedule
- monitor and improve own work performance in accordance with organisational requirements
- make recommendations for own work improvement according to 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 the key requirements of legislation, codes of practice and national standards relevant to off-site workers
- outline ethical and security issues relating to off-site work
- summarise roles and responsibilities of off-site worker/s, supervisor/s and the organisation
- list barriers to successful off-site working and describe ways to address them.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability - workplace effectiveness field of work and include access to:

- office equipment and resources

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- workplace documentation relevant to off-site workers
- legislation, regulations and standards for off-site workers
- 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

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BSBWOR402A Promote team effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to promote teamwork. It involves developing team plans to meet expected outcomes, leading the work team, and proactively working with the management of the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have an important leadership role in the development of efficient and effective work teams. They play a prominent part in team planning, supervising the performance of the team and developing team cohesion. They 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.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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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. Plan to achieve team outcomes	1.1. Identify, establish and document ***team purpose***, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** in ***consultation*** with team members 1.2. Support team members in meeting expected outcomes
2. Develop team cohesion	2.1. Provide opportunities for input of team members into planning, decision making and operational aspects of work team 2.2. Encourage and 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 to encourage, value and reward individual and team efforts and contributions 2.4. Recognise and address issues, concerns and problems identified by team members or refer to ***relevant persons*** as required

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ELEMENT	PERFORMANCE CRITERIA
3. Participate in and facilitate work team	3.1. Actively encourage team members to participate in and take responsibility for team activities and communication processes 3.2. Give the team support to identify and resolve problems which impede its performance 3.3. Ensure own contribution to work team serves as a role model for others and enhances the organisation's image within the work team, the organisation and with clients/customers
4. Liaise with management	4.1. Maintain open ***communication*** with ***line manager***/***management*** at all times 4.2. Communicate information from line manager/management to the team 4.3. Communicate unresolved issues, concerns and problems raised by the team/team members to line manager/management and ensure follow-up action is taken 4.4. Communicate unresolved issues, concerns and problems related to the team/team members raised by line managers/management to the team and ensure follow-up to action is taken

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- communication skills to:
  - boost team morale
  - deal with team conflict
  - deliver messages from management
  - facilitate discussion
  - mentor and coach
- leadership skills
- planning and organising skills.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• organisational goals, objectives and plans
• organisational policy and procedures framework
• organisational structure, including organisational chart
• principles and techniques associated with:
  • delegation and work allocation
  • goal setting
  • group dynamics and processes
  • individual behaviour and difference
  • leadership
  • motivation
  • negotiation
  • 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	Evidence of the following is essential: • teamwork plan with details of how it was generated and how it will be monitored so that team goals can be met • techniques in communicating information, dealing with team conflict and resolving issues • knowledge of organisational goals, objectives and plans.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in working with team dynamics • observation of performance in role plays • oral or written questioning to assess knowledge of principles and techniques associated with group dynamics and processes • evaluation of opportunities provided for input of team members into planning, decision making and operational aspects of work team • review of feedback provided to team members • review of teamwork plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

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.	
Team purpose, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** may include:	• action plans, business plans and operational plans linked to strategic plans • expected outcomes and outputs • goals for individuals and the work team • individual and team performance plans and key performance indicators • occupational health and safety (OHS) responsibilities
Consultation may include:	• attending meetings, interviews, brainstorming sessions

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RANGE STATEMENT	
	• using email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual effectiveness • using mechanisms to provide feedback to the work team in relation to consultation outcomes
Responsibility for own work may involve:	• individual and joint actions • individuals and teams
Feedback may refer to:	• formal/informal gatherings between team members where there is communication on work related matters • informal communication of ideas and thoughts on specific tasks, outcomes, decisions, issues or behaviours
Relevant persons may include:	• colleagues • direct superior or other management representatives • OHS committees and other people with specialist responsibilities
Communication may include:	• face-to-face • formal/informal interaction • verbal, written or electronic communication
Line manager*/*management may refer to:	• direct superior or other management representatives

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

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Co-requisite units

Co-requisite units		

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BSBWOR403 Manage stress in the workplace

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 signs and sources of stress within job roles and according to key performance indicators (KPIs). Management strategies to aid recovery from stressful situations are also essential.

It applies to individuals who work at a managerial level, have excellent communication skills and apply knowledge of organisational policies, occupational health and safety (OHS) and other relevant legislation.

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

Unit Sector

Industry Capability – Workplace Effectiveness

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. Develop and implement personal stress management strategy	1.1 Recognise signs and sources of stress 1.2 Use appropriate techniques to manage own stress 1.3 Maintain personal stamina and resilience 1.4 Maintain personal work/life balance 1.5 Become a role model in managing stress and time
2. Develop stress	2.1 Analyse and understand potential sources of fatigue and stress

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ELEMENT	PERFORMANCE CRITERIA
management strategies and techniques within a team	in the work environment 2.2 Develop an understanding of a range of stress management techniques within a team 2.3 Develop techniques to support achievement of key performance indicators (KPIs) and priorities 2.4 Encourage team members to support each other in managing stress 2.5 Adopt strategies to effectively reduce, manage and deal with stress within a team 2.6 Adopt stamina management strategies to maximise performance 2.7 Develop techniques to assist team members to recover effectively from a stressful or difficult situation
3. Implement stress management techniques within a team	3.1 Adopt work routine and procedural strategies to minimise stress and fatigue within a team 3.2 Use appropriate time management tools and techniques 3.3 Develop individual/group training and development program as required 3.4 Use team meetings and other opportunities to discuss stress management techniques and coach staff in using these techniques 3.5 Regularly evaluate tools, techniques and strategies 3.6 Develop team awareness of sources of internal and external support
4. Develop team and morale building strategies	4.1 Develop a strategy to engage and develop team members 4.2 Develop a communication strategy within a team 4.3 Manage and use team meetings effectively 4.4 Develop a supportive and responsive team environment 4.5 Delegate effectively to further empower and motivate team members
5. Monitor and address stress levels within a team	5.1 Monitor individual staff performance against performance requirements 5.2 Conduct regular staff reviews to identify variations and difficulties impacting work requirements 5.3 Monitor and support team members when in stressful situations 5.4 Respond appropriately to behavioural signs of stress among

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ELEMENT	PERFORMANCE CRITERIA
	team members 5.5 Monitor work/life balance of team members 5.6 Discuss outcomes and develop action plans with team members 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	2.3, 3.3, 5.1	• Analyses and compares specific and complex text to determine and distinguish requirements
Writing	3.2, 3.3, 4.1, 4.2, 5.2, 5.6	• Develops documents that clearly explain ideas and advice • Records information using required tools
Oral Communication	2.4, 3.4, 3.6, 5.2, 5.4, 5.6	• Provides advice and information using language and features suitable to the audience in group and individual meetings • Uses listening and questioning techniques to confirm understanding
Numeracy	3.2	• Interprets mathematical information related to timelines
Navigate the world of work	2.1	• Understands legislative responsibility to provide a safe working environment
Interact with others	1.5, 2.4, 3.6, 4.3, 4.4, 4.5, 5.2, 5.4, 5.6	• Understands how own behaviour impacts others and leads by example • Establishes and builds rapport and relationships with team members • Provides effective support, feedback and coaching in difficult or tense situations
Get the work done	1.2, 2.1, 2.2, 2.3, 2.5, 2.6, 2.7, 3.1-3.5, 3.6, 4.1, 4.2, 4.4, 4.5, 5.1-5.5	• Plans and monitors tasks to ensure deadlines are met and competing demands are accommodated • Establishes, implements and monitors strategies, development plans and actions for team members • Uses problem-solving techniques to analyse and address issues that arise

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWOR403 Manage stress in the workplace	BSBWOR403A Manage stress in the workplace	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

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Assessment Requirements for BSBWOR403 Manage stress in the workplace

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:

- use appropriate techniques and strategies to manage own stress
- identify potential sources of fatigue or stress in the work environment
- assist team members to develop and use strategies to manage or minimise stress
- build team morale and cohesion
- monitor performance and stress levels of team members, and respond 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:

- describe signs and sources of stress and fatigue
- summarise stress management and reduction techniques
- summarise stamina management techniques
- explain the relationship between time management and stress
- explain the requirements under work health and safety (WHS) legislation to address workplace stress.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability – workplace effectiveness field of work and include access to:

- workplace equipment and resources
- organisational policies and procedures for stress management
- relevant legislation on health and safety

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- 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

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BSBWOR404 Develop work priorities

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 obtain feedback on own work performance and access learning opportunities for professional development.

This 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

Industry Capability – Workplace Effectiveness

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. Plan and complete own work schedule	1.1 Prepare workgroup plans which reflect consideration of resources, client needs and workgroup targets 1.2 Analyse and incorporate work objectives and priorities into personal schedules and responsibilities 1.3 Identify factors affecting the achievement of work objectives and establish contingencies and incorporate them into work plans 1.4 Efficiently and effectively use business technology to manage

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ELEMENT	PERFORMANCE CRITERIA
	and monitor planning completion and scheduling of tasks
2. Monitor own work performance	2.1 Identify and analyse personal performance through self-assessment and feedback from others on the achievement of work objectives 2.2 Seek and evaluate feedback on performance from colleagues and clients in the context of individual and group requirements 2.3 Routinely identify and report on variations in the quality of service and performance in accordance with organisational requirements
3. Co-ordinate professional development	3.1 Assess personal knowledge and skills against organisational benchmarks to determine development needs and priorities 3.2 Research and identify sources and plan for opportunities for improvement in consultation with colleagues 3.3 Use feedback to identify and develop ways to improve competence within available opportunities 3.4 Identify, access and complete professional development activities to assist career development 3.5 Store and maintain records and documents relating to achievements and assessments in accordance with 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	Performance Criteria	Description
Learning	3.1, 3.2, 3.3, 3.4	• Develops strategies to reflect on own performance, obtain feedback, and plan and source professional development opportunities
Reading	1.2, 2.1, 2.3, 3.1, 3.5	• Recognises and interprets textual information from relevant sources to understand organisation's policies and practices
Writing	1.1, 1.3, 2.2, 2.3, 3.2, 3.5	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively

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Oral Communication	2.2, 2.3, 3.2	• Provides or seeks information using language suitable to audience and context • Employs listening and questioning techniques to confirm understanding
Numeracy	1.1, 1.2, 1.3	• Interprets numerical information related to budgets and timeframes
Navigate the world of work	1.2, 2.1, 2.3, 3.1, 3.5	• Identifies and understands roles and responsibilities in relation to organisational objectives, policies and procedures
Interact with others	2.2, 2.3, 3.2	• Selects and uses appropriate practices when communicating with internal and external stakeholders to seek or share information • Establishes and builds rapport and relationships with others to foster a culture of trust and honesty in communications
Get the work done	1.1-1.4, 2.3, 3.1, 3.2, 3.4, 3.5	• Plans, organises and implements tasks to meet organisational requirements • Systematically gathers and analyses information and evaluates options in order to anticipate potential problems and develop contingency plans • Uses the main features and functions of digital technologies and tools to complete work tasks efficiently and effectively

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR404 Develop work priorities	BSBWOR404A Develop work priorities	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

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Assessment Requirements for BSBWOR404 Develop work priorities

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:

- prepare and communicate own work plan
- schedule work objectives and tasks to support the achievement of the workgroup goals
- review own work performance against workgroup objectives through self-assessment and seeking and acting on feedback from clients and colleagues
- plan and access learning opportunities to extend personal work competencies.

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 how business technology applications can be used to schedule tasks and plan work
- explain techniques to prepare personal plans and establish priorities
- identify methods to identify and prioritise personal learning needs
- outline a range of professional development options
- explain methods to elicit, analyse and interpret feedback
- provide a detailed explanation of methods that can be used to evaluate own performance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability - workplace effectiveness field of work and include access to:

- workplace documentation including policies and procedures, and benchmarks for work group productivity and performance
- workplace equipment and resources

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- 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

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BSBWOR501 Manage personal work priorities and professional development

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 create systems and process to organise information and prioritise tasks.

It applies to individuals working in managerial positions who have excellent organisational skills. The work ethic of individuals in this role has a significant impact on the work culture and patterns of behaviour of others as managers at this level are role models in their work environment.

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

Unit Sector

Industry Capability – Workplace Effectiveness

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 personal work goals	1.1 Serve as a positive role model in the workplace through personal work planning 1.2 Ensure personal work goals, plans and activities reflect the organisation's plans, and own responsibilities and accountabilities 1.3 Measure and maintain personal performance in varying work conditions, work contexts and when contingencies occur

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ELEMENT	PERFORMANCE CRITERIA
2. Set and meet own work priorities	2.1 Take initiative to prioritise and facilitate competing demands to achieve personal, team and organisational goals and objectives 2.2 Use technology efficiently and effectively to manage work priorities and commitments 2.3 Maintain appropriate work-life balance, and ensure stress is effectively managed and health is attended to
3. Develop and maintain professional competence	3.1 Assess personal knowledge and skills against competency standards to determine development needs, priorities and plans 3.2 Seek feedback from employees, clients and colleagues and use this feedback to identify and develop ways to improve competence 3.3 Identify, evaluate, select and use development opportunities suitable to personal learning style/s to develop competence 3.4 Participate in networks to enhance personal knowledge, skills and work relationships 3.5 Identify and develop new skills to achieve and maintain a competitive edge

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	3.1, 3.2, 3.3, 3.4, 3.5	• Investigates and uses a range of strategies to develop personal competence
Reading	1.2, 3.1, 3.2	• Analyses and interprets textual information from organisational policies and practices or feedback to inform personal development planning
Writing	3.2	• Uses feedback to prepare reports that summarise ways to improve competence
Oral Communication	3.2	• Uses active listening and questioning to seek and receive feedback
Navigate the world of work	1.2, 2.1	• Understands how own role contributes to broader organisational goals • Considers organisational protocols when planning own career development

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Interact with others	1.1, 3.2, 3.4	• Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders • Uses interpersonal skills to establish and build positive working relationships with others
Get the work done	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.1	• 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

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR501 Manage personal work priorities and professional development	BSBWOR501B Manage personal work priorities and professional development	Updated to meet Standards for Training Packages Minor edits to clarify Performance Criteria	Equivalent unit

Links

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

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Assessment Requirements for BSBWOR501 Manage personal work priorities and professional development

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:

- use business technology to create and use systems and processes to organise and prioritise tasks and commitments
- measure and maintain personal work performance including assessing competency against competency standards and seeking feedback
- maintain an appropriate work-life balance to manage personal health and stress
- participate in networks
- develop a personal development plan which includes career objectives and an action plan
- develop new skills.

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 principles and techniques involved in the management and organisation of:
  - performance measurement
  - personal behaviour, self-awareness and personality traits identification
  - a personal development plan
  - personal goal setting
  - time
- discuss management development opportunities and options for self
- describe methods for achieving a healthy work-life balance
- outline organisation’s policies, plans and procedures
- explain types of learning style/s and how they relate to the individual
- describe types of work methods and practices that can improve personal performance.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability - workplace effectiveness field of work and include access to:

- workplace equipment and resources
- 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

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BSBWOR502 Lead and manage team effectiveness

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 teams in the workplace and to actively engage with the management of the organisation.

It applies to individuals working at a managerial level who facilitate work teams 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, 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

Industry Capability – Workplace Effectiveness

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 team performance plan	1.1 Consult team members to establish a common understanding of team purpose, roles, responsibilities and accountabilities in accordance with organisational goals, plans and objectives 1.2 Develop performance plans to establish expected outcomes, outputs, key performance indicators (KPIs) and goals for work team 1.3 Support team members in meeting expected performance

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ELEMENT	PERFORMANCE CRITERIA
	outcomes
2. Develop and facilitate team cohesion	2.1 Develop strategies to ensure team members have input into planning, decision making and operational aspects of work team 2.2 Develop policies and procedures to ensure team members take responsibility for own work and assist others to undertake required roles and responsibilities 2.3 Provide feedback to team members to encourage, value and reward individual and team efforts and contributions 2.4 Develop processes to ensure that issues, concerns and problems identified by team members are recognised and addressed
3. Facilitate teamwork	3.1 Encourage team members and individuals to participate in and to take responsibility for team activities, including communication processes 3.2 Support the team in identifying and resolving work performance problems 3.3 Ensure own contribution to work team serves as a role model for others and enhances the organisation's image for all stakeholders
4. Liaise with stakeholders	4.1 Establish and maintain open communication processes with all stakeholders 4.2 Communicate information from line manager/management to the team 4.3 Communicate unresolved issues, concerns and problems raised by team members and follow-up with line manager/management and other relevant stakeholders 4.4 Evaluate and take necessary corrective action regarding unresolved issues, concerns and problems raised by internal or external stakeholders

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

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Reading	1.1, 4.4	• Analyses and interprets textual information from the organisation's policies, goals and objectives to establish team goals or to determine corrective action
Writing	1.2, 2.1, 2.2, 2.4, 4.2, 4.3, 4.4	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	1.1, 2.3, 3.1, 4.1, 4.2, 4.3	• 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
Navigate the world of work	1.1, 2.1, 2.2, 3.3	• Understands how own role contributes to broader organisational goals • Modifies or develops policies and procedures to achieve organisational goals
Interact with others	1.1, 1.3, 2.2, 2.3, 3.1, 3.2, 4.2, 4.3	• Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders • Uses interpersonal skills to gain trust and confidence of team and provides feedback to others in forms that they can understand and use • Adapts personal communication style to build 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 high level conflict resolution skills and ability to engage and motivate others
Get the work done	1.2, 2.1, 2.2, 2.4, 3.2, 4.1, 4.3, 4.4	• 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

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR502 Lead and manage team effectiveness	BSBWOR502B Ensure team effectiveness	Updated to meet Standards for Training Packages	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		Title change	

Links

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

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Assessment Requirements for BSBWOR502 Lead and manage team effectiveness

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:

- use leadership techniques and strategies to facilitate team cohesion and work outcomes including:
  - encouraging and fostering shared understanding of purpose, roles and responsibilities
  - identifying and resolving problems
  - providing feedback to encourage, value and reward others
  - modelling desired behaviour and practices
- develop policies and procedures to ensure team members take responsibility for own work and assist others to undertake required roles and responsibilities
- establish processes to address issues and resolve performance issues
- 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
- facilitate two-way flow of information between team and management relevant to team performance
- evaluate and take necessary corrective action regarding unresolved issues, concerns and problems raised by internal or external stakeholders.

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 how group dynamics can support or hinder team performance

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- outline strategies that can support team cohesion, participation and performance
- explain strategies for gaining consensus
- explain issue resolution strategies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability - workplace effectiveness field of work and include access to:

- workplace documents
- case studies and, where possible, real situations
- office equipment and resources
- 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

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BSBWRK409 Prepare for and participate in dispute resolution

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 prepare for and participate in a dispute resolution process.

It applies to individuals who work in a support position to assist in dealing with conflicts and issues.

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

Unit Sector

Workforce Development – Workplace Relations

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. Prepare for dispute resolution	1.1 Establish facts and issues surrounding the dispute 1.2 Analyse key strengths and weaknesses of own and opposing case 1.3 Determine and analyse dispute resolution process to be applied 1.4 Identify evidence that can be used to support own case 1.5 Make an assessment of realistic and achievable outcomes and agree on objectives for participating in the processes 1.6 Develop an appropriate strategy to deal with the dispute

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ELEMENT	PERFORMANCE CRITERIA
	through agreed or established processes 1.7 File appropriate documentation in accordance with agreed procedure and/or tribunal requirements
2. Participate in dispute resolution processes	2.1 Present an outline of position to support own case and respond to and/or rebut opposing arguments 2.2 Identify common areas of agreement, seek to minimise areas of disagreement and achieve an outcome that aligns with own objective/s
3. Reach an outcome to dispute resolution	3.1 Use communication techniques to put forward options for dispute resolution 3.2 Seek agreement on identified options consistent with own objectives 3.3 Consult with appropriate parties over authority to reach agreement on particular options 3.4 Refer to appropriate tribunal/person in accordance with dispute resolution process, where agreement cannot be reached 3.5 Clarify agreement or withdraw from dispute resolution process
4 Evaluate and review outcome against objectives	4.1 Report back to relevant personnel 4.2 Review outcome with relevant personnel against objectives 4.3 Review dispute resolution processes for effectiveness

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	1.1-1.5, 2.1, 2.2, 3.5, 4.2, 4.3	• Gathers, interprets and analyses relevant information from a wide range of sources to inform negotiations, clarify preparation process and review documented outcomes
Writing	1.1, 1.2, 1.4, 1.5, 1.7, 2.1, 3.1-3.4, 4.1-4.3	• Documents outcomes and discussions using industry relevant terminology • Prepares documentation expressing ideas and exploring complex issues that is constructed logically,

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		succinctly and accurately
Oral Communication	1.1, 1.3-1.5, 2.1, 2.2, 3.1-3.5, 4.1, 4.2	• Engages in complex oral interactions using active listening and questioning techniques
Navigate the world of work	1.6, 1.7, 3.4	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements • Identifies and acts on issues that contravene relevant policies, procedures or legal requirements
Interact with others	1.1, 1.5, 2.1, 2.2, 3.1-3.3, 4.1-4.3	• Selects and uses appropriate conventions and protocols when communicating with clients and co-workers in a range of work contexts • Reflects on conflict resolution process and outcomes to improve skills and understanding • Recognises behaviours and triggers that contribute to conflict and implements strategies to moderate conflict
Get the work done	1.1-1.7, 2.1, 2.2, 3.2, 3.4, 3.5, 4.2	• Takes responsibility for planning, sequencing and prioritising complex tasks for efficient and effective outcomes • Recognises and addresses complex problems involving multiple variables • Makes a range of critical and non-critical decisions in relatively complex situations.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWRK409 Prepare for and participate in dispute resolution	BSBWRK409A Prepare for and participate in dispute resolution	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

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Assessment Requirements for BSBWRK409 Prepare for and participate in dispute resolution

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:

- document at least one case relating to an individual grievance, workplace dispute or related matter which includes:
  - supporting evidence of how facts were gathered and analysed
  - a description of the process that occurred to achieve a resolution
  - a review of the process
- analyse roles of parties involved in at least one dispute, and effectiveness of strategies used in the dispute resolution
- report on outcomes of at least one example of a dispute process.

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 industrial relations legislation or regulations
- describe relevant policies and procedures
- identify key entities in the current Australian industrial relations system
- explain relevant common law rights and obligations
- identify sources of expert advice.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – workplace relations field of work and include access to:

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- awards and enterprise bargaining agreements
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBWRK411 Support employee and industrial relations procedures

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 communicate and implement industrial relations policies and procedures to effectively represent organisations/employers.

It applies to individuals who work in support positions, assisting others in dealing with industrial relations conflicts and issues.

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

Unit Sector

Workforce Development – Workplace Relations

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. Communicate and implement organisation's industrial relations policies and procedures	1.1 Source and disseminate relevant legislation, agreements, policies and procedures to relevant persons and groups 1.2 Implement agreements, policies and procedures according to site, enterprise and statutory requirements 1.3 Support strategies to effectively communicate with relevant persons and groups on industrial relations matters 1.4 Promote the organisation's industrial relations procedures to

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ELEMENT	PERFORMANCE CRITERIA
	relevant persons and groups 1.5 Represent the organisation appropriately in discussions with key stakeholders
2. Assist in minimising industrial relations conflict	2.1 Monitor the implementation of industrial relations policies and procedures 2.2 Process documentation and report to management and other relevant parties about potential industrial relations conflicts 2.3 Support managers to contain industrial relations conflicts and deal with grievances and disputes, within limits of own authority 2.4 Work with employees to resolve personal grievances and prevent escalation of industrial relations conflicts 2.5 Work under supervision to source specialist industrial relations expertise
3. Enhance industrial relations	3.1 Trial and implement strategies to monitor the implementation of the organisation's industrial relations policies and procedures 3.2 Implement strategies to facilitate feedback on the industrial climate 3.3 Implement strategies to strengthen relationships with relevant persons and groups 3.4 Provide information and feedback to management on industrial relations 3.5 Provide information and advice to relevant persons 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.2, 3.1	• Comprehends and analyses complex texts from a variety of sources and records to determine relevance to requirements or review implementation of strategies
Writing	1.1, 1.2, 2.1, 2.2, 3.4, 3.5	• Prepares required documents using language and structure appropriate to purpose and audience

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Oral Communication	1.1-1.5, 2.2, 2.4, 2.5, 3.4, 3.5	• 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
Navigate the world of work	1.2, 1.4, 1.5, 2.1, 2.3, 3.1	• 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
Interact with others	1.1, 1.3-1.5, 2.2-2.5, 3.2-3.5	• 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 • Uses effective strategies to moderate conflict and negotiate solutions
Get the work done	1.1, 2.1-2.3, 2.5, 3.1, 3.4, 3.5	• Plans and organises tasks required to achieve required outcomes, seeking advice from others when necessary • Makes a range of critical and non-critical decisions in relatively complex situations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWRK411 Support employee and industrial relations procedures	BSBWRK411A Support employee and industrial relations procedures	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

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Assessment Requirements for BSBWRK411 Support employee and industrial relations procedures

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:

- locate information required to identify relevant legislation, agreements, policies and procedures in relation to industrial matters
- use effective communication techniques to support the resolution of 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.

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 industrial relations policies and procedures
- summarise grievance resolution policy and procedures
- describe relevant legislation, codes of practice and national standards
- describe the relevant state/territory and federal industrial relations systems
- identify sources of expert advice.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – workplace relations field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace policies and procedures

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- 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

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BSBWRK510 Manage employee relations

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 employee and industrial relations matters in an organisation. It involves developing and implementing employee and industrial relations policies and plans and managing conflict resolution negotiations.

It applies to those who are authorised to oversee industrial relations and manage conflict and grievances in an organisation. They will have a sound theoretical knowledge base in human resources management and industrial relations as well as current knowledge of industrial relations trends and legislation.

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

Unit Sector

Workforce Development – Workplace Relations

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. Develop employee and industrial relations policies and plans	1.1 Analyse strategic plans and operational plans to determine long term employee relations 1.2 Analyse existing employee relations performance in relation to workforce objectives 1.3 Evaluate options in terms of cost-benefit, risk-analysis and current legislative requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Work with the management team to develop industrial relations policies and plans 1.5 Identify the skills and knowledge needed by management and the workforce to effectively implement these strategies and policies
2. Implement employee relations policies and plans	2.1 Develop an implementation plan and a contingency plan for the employee relations policies and strategies 2.2 Make arrangements for training and development for identified needs to support the employee relations plan 2.3 Undertake associated employee relations activities to reach agreement on changes required by the organisational policies or implementation plan 2.4 Ensure procedures for addressing grievances and conflict are properly documented 2.5 Communicate key issues about procedures for addressing grievances and conflict to stakeholders 2.6 Review employee relations policies and plans to establish whether they are meeting their intended outcomes
3. Manage negotiations to resolve conflict	3.1 Train individuals in conflict-management techniques and procedures 3.2 Identify, and where possible alleviate or eliminate, sources of conflict or grievance according to legal requirements 3.3 Check documentation and other information sources to clarify issues in dispute 3.4 Obtain expert or specialist advice and/or refer to precedents, if required 3.5 Determine desired negotiation outcomes, negotiation strategy and negotiation timeframes 3.6 Advocate the organisation’s position in negotiation to obtain agreement 3.7 Document, and if necessary certify, the agreed outcomes with the relevant jurisdiction 3.8 Implement agreements 3.9 Take remedial action where groups or individuals fail to abide by agreements

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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, 3.3	• Interprets, critically analyses and applies appropriate strategies to construct meaning from complex texts
Writing	1.4, 2.1, 2.4, 2.5, 3.7	• Displays knowledge of required structure and layout, employing broad vocabulary, grammatical structure and conventions appropriate to purpose and audience
Oral communication	1,4, 2.5, 3.1, 3.6	• Conveys information using language and non-verbal features appropriate to the audience • Employs listening and questioning techniques to clarify and confirm understanding
Numeracy	1.2, 1.3	• Extracts and evaluates the mathematical information embedded in a range of tasks and texts
Navigate the world of work	1.3, 1.4, 2.3, 2.6, 3.2, 3.7	• 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
Interact with others	1.4, 2.3, 3.1, 3.2, 3.4, 3.6, 3.9	• 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
Get the work done	1.3, 1.4, 1.5, 2.1, 2.2, 2.4, 2.5, 3.2, 3.5, 3.7, 3.8	• 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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWRK510 Manage employee relations	BSBWRK510A Manage employee relations	Updated to meet Standards for Training Packages Minor edits 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=11ef6853-ceed-4ba7-9d87-4da407e23c10

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Assessment Requirements for BSBWRK510 Manage employee relations

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:

- analyse organisational documentation to determine long-term employee relations objectives and current employee relations performance
- collaborate with others to develop and review industrial relations policies and plans
- develop implementation and contingency plans for industrial relations 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 industrial relations conflicts, including advocating the organisation's position during negotiations and documenting, implementing and following up agreements.

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 relevant industrial relations legislation or regulations
- summarise enterprise and workplace bargaining processes
- summarise key entities in the current Australian industrial relations system, including courts and tribunals, trade unions and employer bodies
- identify sources of expert advice.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the workforce development – workplace relations field of work and include access to:

- awards and enterprise bargaining agreements
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- 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

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BSBWRT301 Write simple documents

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, draft and finalise a basic document.

It applies to individuals who apply a broad range of competencies in various work contexts and may exercise some discretion and judgement to produce a range of workplace documentation.

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

Unit Sector

Communication – Writing

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 Plan document	1.1 Determine audience and purpose for the document 1.2 Determine the format and structure 1.3 Establish key points for inclusion 1.4 Identify organisational requirements 1.5 Establish method of communication 1.6 Establish means of communication

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ELEMENT	PERFORMANCE CRITERIA
2 Draft document	2.1 Develop draft document to communicate key points 2.2 Obtain and include any additional information that is required
3 Review document	3.1 Check draft for suitability of tone for audience, purpose, format and communication style 3.2 Check draft for readability, grammar, spelling, and sentence and paragraph construction 3.3 Check draft for sequencing and structure 3.4 Check draft to ensure it meets organisational requirements 3.5 Ensure draft is proofread, where appropriate, by supervisor or colleague
4 Write final document	4.1 Make and proofread necessary changes 4.2 Ensure document is sent to intended recipient 4.3 File copy of document in accordance with 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	Performance Criteria	Description
Reading	1.1-1.3, 3.1-3.4, 4.1	• Recognises and interprets a variety of text to determine and confirm task requirements • Proofreads documents checking for grammar, spelling, structure, and suitability of style and format for audience
Writing	2.1, 2.2, 3.1-3.5, 4.1	• Produces and edits basic documents, according to organisational requirements, for a given audience and purpose
Oral Communication	2.2, 3.5	• Uses listening and questioning skills to seek additional information or confirmation of task completion
Navigate the world of work	1.4, 3.4, 4.3	• Understands and complies with organisational policies and procedures

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Interact with others	2.2, 3.5	• Follows accepted communication practices and protocols when seeking information or feedback from others
Get the work done	1.1-1.6, 2.1, 2.2, 3.4, 3.5, 4.1-4.3	• Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes • 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**
BSBWRT301 Write simple documents	BSBWRT301A Write simple documents	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

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Assessment Requirements for BSBWRT301 Write simple documents

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, draft and finalise three different simple documents that accurately convey the required basic information in a format suitable for the intended audience and in accordance with organisational policies and procedures for document production.

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 the process for checking basic grammar, spelling and punctuation
- describe different communication methods
- describe how audience, purpose and method of communication influence the tone of a document.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the communication – writing field of work and include access to:

- office equipment and resources to assist in document production
- organisational policies and procedures
- examples of documents to review.

Assessors must satisfy NVR/AQTF assessor requirements.

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Links

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

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BSBWRT401 Write complex documents

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 documents, draft text, prepare final text and produce documents of some complexity.

It applies to individuals who work in a range of business environments and are skilled in the creation of reports, information and general promotion documents that are more complex than basic correspondence, memos 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

Communication – Writing

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 Plan documents	1.1 Determine the purposes of documents 1.2 Choose appropriate formats for documents 1.3 Establish means of communication 1.4 Determine requirements of documents 1.5 Determine categories and logical sequences of data, information and knowledge to achieve document objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Develop overview of structure and content of documents
2 Draft text	2.1 Review and organise available data, information and knowledge according to proposed structure and content 2.2 Ensure data, information and knowledge is aggregated, interpreted and summarised to prepare text that satisfies document purposes and objectives 2.3 Include graphics as appropriate 2.4 Identify gaps in required data and information, and collect additional material from relevant enterprise personnel 2.5 Draft text according to document requirements and genre 2.6 Use language appropriate to the audience
3 Prepare final text	3.1 Review draft text to ensure document objectives are achieved and requirements are met 3.2 Check grammar, spelling and style for accuracy and punctuation 3.3 Ensure draft text is approved by relevant enterprise personnel 3.4 Incorporate revisions in final copy
4 Produce document	4.1 Choose basic design elements for documents appropriate to audience and purpose 4.2 Use word processing software to apply basic design elements to text 4.3 Check documents to ensure all requirements are 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, 2.1, 2.2, 2.4, 3.1, 3.2, 4.3	• Interprets information to identify requirements and prepares material suitable to target audience and environment • Proofreads texts for accuracy
Writing	1.6, 2.2, 2.3, 2.5,	• Creates documents for a specific audience using cohesive and well-structured language to convey

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	2.6, 3.2, 3.4, 4.1	detailed and accurate information • Ensures vocabulary, layout and grammatical arrangement achieves meaning and intent of document
Oral Communication	1.1, 1.4, 2.4, 3.3	• Obtains information or clarifies requirements by asking questions and listening
Navigate the world of work	1.4, 4.3	• Adheres to organisational policies and procedures related to document production
Interact with others	1.1, 1.4, 1.5, 2.4, 3.3	• Follows accepted communication practices and protocols when seeking advice about documents from colleagues, supervisors and managers
Get the work done	1.1-1.6, 2.1-2.5, 3.3, 4.1-4.2	• Plans, organises and implements tasks required to produce documents • Makes decisions based on standard procedures, using more formal decision making processes where required • 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**
BSBWRT401 Write complex documents	BSBWRT401A Write complex documents	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

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Assessment Requirements for BSBWRT401 Write complex documents

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, draft and finalise complex documents that require review and analysis of a range of information sources
- use business technology to apply formatting, and incorporate graphics
- edit the draft text to ensure accuracy and clarity of information, obtain feedback on the draft and revise the draft
- apply the enterprise style guide/house style.

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 the enterprise style guide/house style
- outline formatting styles and their impact on formatting, readability and appearance of documents
- explain rules and conventions for written English, as defined by general and specialist sources.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the communication – writing field of work and include access to:

- office equipment and resources
- organisational policies and procedures
- organisational style guides.

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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

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BSBWRT501 Write persuasive copy

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 interpret a creative brief and evaluate a range of innovative options to write persuasive copy.

It 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

Communication – Writing

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. Analyse and interpret creative brief	1.1 Analyse and confirm technique/s for expressing central idea or creative concept 1.2 Identify and check content and supporting information for accuracy and completeness 1.3 Confirm schedule and budgetary requirements for creating copy 1.4 Identify legal and ethical constraints impacting copy to be

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ELEMENT	PERFORMANCE CRITERIA
	developed
2. Evaluate creative options	2.1 Evaluate design and copy options against requirements of creative brief 2.2 Select option/s enabling required information and images to be communicated within time and budgetary requirements
3. Prepare persuasive copy	3.1 Create original copy with impact, which sets product, service or idea being communicated apart from the competition and competitor's promotional material 3.2 Create copy which communicates required image, and features and benefits of the product, service or idea 3.3 Create copy which meets requirements of creative brief in terms of information, format, language, writing style, and level of detail 3.4 Produce copy on time and within budget 3.5 Produce copy which complies with legal, organisational and ethical requirements

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, 2.1, 3.3, 3.5	• Recognises and interprets textual information to establish job requirements from relevant information • Proofreads content to ensure accuracy and completeness
Writing	3.1-3.3, 3.5	• Creates documents to ensure clarity of meaning, accuracy, and consistency of information using specific and detailed language to convey explicit information and requirements.
Numeracy	1.3, 3.4	• Interprets numerical information to confirm budget constraints and job deadlines
Navigate the world of work	1.4, 3.5	• Takes full responsibility for following policies, procedures and legislative requirements

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Get the work done	1.3, 2.1, 2.2, 3.1, 3.2, 3.4	• Accepts responsibility for planning, prioritising and sequencing complex tasks and workload • Uses systematic, analytical processes in complex, non-routine situations, designing, gathering relevant information and evaluating options • Develops new and innovative ideas through exploration and analysis • Understands 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**
BSBWRT501 Write persuasive copy	BSBWRT501A Write persuasive copy	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

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Assessment Requirements for BSBWRT501 Write persuasive copy

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:

- analyse and evaluate a design brief including:
  - check information for accuracy
  - work to schedule
  - work to budgetary requirements
  - locate and adhere to organisation's legal and ethical constraints
- produce persuasive copy with high impact, surpassing competitor's promotional material.

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 ethical requirements which may impact production and delivery of creative copy
- explain relevant legislation, standards and codes of practice affecting production and delivery of copy
- outline constraints to be considered during analysis, evaluation and preparation of copy
- explain organisational policies and procedures relevant to writing copy
- describe persuasive writing techniques
- explain structure of persuasive copy.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the communication – writing field of work and include access to:

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- 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 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

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AHCBUS607A Implement a monitoring, evaluation and reporting program

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit covers the process of implementing a monitoring, evaluation and reporting program for an organisation and defines the standard required to: implement a monitoring and evaluation strategy; collect and manage data; analyse complex information; prepare reports and information products.

Application of the Unit

Application of the unit	This unit applies to the implementation of a Monitoring Evaluation and Reporting (MER) strategy to measure progress against targets and reporting responsibilities.

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Not Applicable

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement a monitoring and evaluation strategy	1.1. Collect relevant baseline data. 1.2. Consult with stakeholders and the community. 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. Implement chosen monitoring and evaluation methods in accordance with defined strategy. 1.5. Ensure standard procedures and recording templates are available for use. 1.6. Ensure program timelines are communicated and monitored. 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 colleagues and contractors involved in the monitoring and evaluation process. 2.5. Evaluate the effectiveness, efficiency and appropriateness of investment and project priorities as required by the evaluation design.
3. Prepare reports and	3.1. Report against milestones and outputs.

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ELEMENT	PERFORMANCE CRITERIA
information products	3.2. Produce appropriate information products to keep stakeholders informed and engaged. 3.3. Communicate findings and activities to stakeholder groups according to program schedule. 3.4. Negotiate changes to projects and programs with stakeholders. 3.5. Apply findings to improve the delivery and alignment of projects and policy decisions with organisational targets and mission. 3.6. Ensure the style of reporting reflects the audience and how the information is to be used.
4. Review the monitoring and evaluation process	4.1. Foster a culture of self-evaluation and learning through encouraging ongoing participation, consultation and communication with stakeholders. 4.2. Review and adapt ongoing evaluation strategy and processes and provide feedback on the implementation and the evaluation design.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- application of monitoring and evaluation methods to ensure integrity and validity
- data collection and management
- use literacy skills to fulfil job roles as required by the organisation. The level of skill may range from reading and understanding documentation to completion of written reports
- use oral communication skills/language competence to fulfil the job role as specified by the organisation including questioning, active listening, asking for clarification, negotiating solutions and responding to a range of views
- use numeracy skills to estimate, calculate and record complex workplace measures
- use 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.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• quantitative and qualitative methods for monitoring and evaluation • data management processes and systems • policy and program management processes • adaptive management an review cycles.

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	The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge and include achievement of the following: • implement a monitoring and evaluation strategy • collect and manage data • analyse complex information • prepare reports and information products • review the evaluation process.
Context of and specific resources for assessment	Competency requires the application of work practices under work conditions. Selection and use of resources for some worksites may differ due to the regional or enterprise circumstances.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole.	
Monitoring and evaluating	• the range of targets and reporting

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RANGE STATEMENT	
responsibilities may include:	responsibilities of any monitoring evaluation and reporting program.

Unit Sector(s)

Unit sector	Business

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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CHCAD402D Support the interests, rights and needs of clients within duty of care requirements

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required by the worker to uphold the interests and rights of clients within the organisation

Application of the Unit

Application	This unit may apply to work undertaken across a range of sectors in delivery of community services

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of	The Performance Criteria specify the level of performance required to demonstrate achievement of the

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competency.	Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Provide support to client for the realisation of their *interests*, *rights* and needs within job roles and *responsibilities*	1.1 Support and encourage client to exercise their *rights* and personal preferences without compromising their safety and that of others 1.2 Appropriately inform one's supervisor, other health workers and the service about *interests*, *rights* and *needs of the client* 1.3 Identify situations of risk or potential risk and refer appropriately
2. Support and safeguard the *interests* and *rights* of clients	2.1 Make decisions and take action within the scope of *responsibilities* as specified in the job description 2.2 Properly maintain knowledge and skill required for daily activities of work 2.3 Apply work practices to minimise potential for harm to clients, self and others 2.4 Take care to behave in a lawful, reasonable and careful manner at all times

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

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REQUIRED SKILLS AND KNOWLEDGE

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Duty of care requirements
- Common health problems and their effects
- Statements of rights, e.g. UN Charter, relevant outcomes standards documents
- Common risks to client safety
- Organisation guidelines
- Rights and responsibilities of client
- Awareness of discriminatory actions

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Demonstrate understanding of duty of care requirements
- Perform work within duty of care requirements
- Uphold and support the rights and interests of client groups in the workplace, except where contradicted by the clients' functioning and mental state

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Apply oral communication competence in order to represent the interests, rights and needs of the client to supervisor:
  - language used may be English or community language depending on the organisation
- Apply written communication skills if organisation policies and procedures require client needs to be represented in written form

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
  This may include the use of languages other than English and alternative communication systems
- Assessment may be conducted on one or more occasions but must include the normal range of workplace situations

Access and equity considerations:

- All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work
- All workers should develop their ability to work in a culturally diverse environment
- In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people
- Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities

Context of and specific resources for assessment:

- This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged
- Resources required for assessment include access to:
  - appropriate workplace where assessment can take place
  - simulation of realistic workplace setting for assessment

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EVIDENCE GUIDE

Method of assessment:

- Assessment may include observation, questioning and evidence gathered from a workplace environment
- Workplace evidence can include testimonials from colleagues or clients

Related units:

This unit of competency may be (but is not required to be) assessed in conjunction with units on communication and/or with the following related unit if they are included in qualification packaging:

- CHCCS400A Work within a relevant legal and ethical framework

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. Add any 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.

Appropriate representation may include:

- Meeting client needs in the context of organisation requirements
- Awareness of potential conflict between client needs and organisation requirements

Interests may include:

- Possessions
- Bank accounts
- Accommodation
- Facilities
- Services available and desired
- Recreational pursuits

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RANGE STATEMENT

Rights include principles expressed in:	• Charters of rights • Outcomes standards documents • General human rights and freedom from discrimination
Interests, rights and needs of the client may be made known by:	• Verbal representation • Written representation
Social rights of the client may include:	• Freedom of association • Friendship
Rights may be detailed in:	• In mission statements and philosophies of service provider organisations
Rights may include:	• The right of participation or non participation to the degree desired • The right to receive quality service • The right to refuse services
The needs of the client may include:	• Physical and emotional security • Support and care • Economic support • Household assistance and maintenance
Worker's responsibilities may include working within:	• Care/case plan • Job description and job role • Training received • Relevant legislation such as Poisons Act, State Nursing Acts, Podiatrists Acts, etc
Factors affecting client exercising rights may include:	• Person's culture • Another language • Gender relationships

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RANGE STATEMENT

- Different emphasis on time and work
- Different views of personal space and touch
- Different beliefs on the community and family
- Individual religious beliefs

Legal rights of the client may include:

- Rights of common law
- Rights outlined under relevant outcomes standards
- Rights under the constitution
- Rights under legislation

Unit Sector(s)

Not Applicable

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CHCCS407C Operate referral procedures

Modification History

CHC08 Version 3	CHC08 Version 4	Comments
CHCCS407B Operate referral procedures	CHCCS407C Operate referral procedures	ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Descriptor This unit describes the knowledge and skills required to confirm the needs of clients, advise them of referral options and arrange the referral

Application of the Unit

Application The support may be provided in a one to one service delivery mode or in a group

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills This unit contains Employability Skills

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Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm client needs	1.1 Discuss client *presenting needs* with the client 1.2 Confirm client history and records 1.3 Document client's *service expectations* 1.4 Develop a plan of action is confirm with the client
2. Advise on referral options	2.1 Outline services to assist the client 2.2 Discuss *process of referral* with the client 2.3 Outline client's responsibilities and any conditions
3. Arrange referral	3.1 Clarify timeframes and procedures for accessing services 3.2 Follow referral procedures with all providers 3.3 Inform clients of progress towards meeting agreed service expectation and *plan of action* 3.4 Communicate to service provider and client, processes to review and manage service provision

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Available services and constraints on delivery
- The broader service delivery and training networks in the local area
- Process of referral and documentation of the referral

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Identify presenting needs and respond appropriately within the guidelines of the service
- Interpret and apply relevant policies
- Demonstrate application of skills in:
  - appropriate one to one communication process
  - record-keeping and documentation processes, including effective use of relevant information technology in line with work health and safety (WHS) guidelines

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, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • Evidence must include observation of performance in the work environment or in a simulated work setting • Evidence must include demonstration over a period of time to ensure consistency of performance

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EVIDENCE GUIDE

Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities

Context of and specific resources for assessment:	• This unit can be delivered and assessed independently, however holistic assessment practice with other community services units of competency is encouraged
	• Resource requirements for assessment include access to:
	  • an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment
	  • equipment and resources normally used in the workplace

Method of assessment may include:	• Observations • Questioning • Evidence gathered from the workplace environment

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT

work environments and situations that may affect performance. Add any 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.

Presenting needs refers to:	• Those readily observable or easily communicated needs prior to any counselling service Examples include: • unemployment • lack of benefit payment • difficulty in communicating • cognitive impairment • financial difficulties
Service expectations refers to:	• The type of assistance the client considers they require and includes a comment on urgency and breadth of the requirement.
Process of referral may:	• Differ between agencies, however in the context of this unit it is implied that there is a formal process which is applied and communicated
Plan of action refers to:	• The agreed responsibilities and actions to support the client move towards increased interaction and engagement with the community

Unit Sector(s)

Not Applicable

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CHCCS412E Deliver and develop client services

Modification History

CHC08 Version 3	CHC08 Version 4	Comments
CHCCS412D Deliver and develop client services	CHCCS412E Deliver and develop client services	ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Descriptor This unit describes the knowledge and skills required to meet the specific needs of a broad range of existing and new clients within a defined framework

Application of the Unit

Application This unit may apply in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills This unit contains Employability Skills

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Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Target *client services*	1.1 In identifying and assessing client needs, give due consideration to individual rights, relevant community requirements and the organisation statutory and legislative environment 1.2 Establish and maintain client profiles in accordance with organisation and legislative requirements and use to monitor delivery of appropriate services 1.3 Develop client service delivery plan to address client needs and rights, including aims and objectives, resourcing implications, evaluation strategies and contingency plans 1.4 Identify and select appropriate client service to meet client needs within the scope of area of responsibility 1.5 Implement a range of mechanisms to ensure regular client service feedback is sought to gauge levels of satisfaction 1.6 Record and analyse client service feedback and report to appropriate personnel to ensure any problems are resolved and improvements implemented 1.7 Where client data and profiles indicate inability of the organisation to meet client needs, redesign services or refer *clients* to another organisation as required
2. Deliver client service	2.1 Ensure dealings with clients are consistent with their needs and rights, with accepted practice and codes of conduct of the organisation and duty of care responsibilities 2.2 Ensure service delivered to clients upholds relevant statutory and legislative requirements, the

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ELEMENT	PERFORMANCE CRITERIA
	reputation of the organisation and the area of work
	2.3 Base client service delivery on accurate and up to date information about client, service options and the service being delivered
	2.4 Complete and maintain all appropriate documentation related to client service delivery according to organisation standards
	2.5 Implement strategies to ensure client services are routinely reviewed in the light of client needs and rights and organisation policies and capabilities, and implement remedial action as appropriate
3. Develop and promote client services	3.1 Promote the service delivery of the organisation wherever opportunities arise
	3.2 Promote services to existing and/or potential clients to ensure that the details of the full range of services are understood
	3.3 Develop, document and promote a range of service options for clients to facilitate informed client access to services
	3.4 Assist clients to identify their needs and rights and select the best available service

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

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REQUIRED SKILLS AND KNOWLEDGE

- Principles of effective client service delivery
- Organisation specific client services provided
- Promotion and marketing of services
- Service delivery skills

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Establish and maintain a network of service providers
- Incorporate the requirements of all groups in client service delivery
- Demonstrate responsiveness to client needs

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Apply oral communication skills required to fulfil the job role in the organisation/service:
  - oral communication skills may include listening, asking questions, providing encouragement
  - language used may be English, sign language or community language depending on client group
- Apply literacy competence required to fulfil the procedures of the organisation/service:
  - language used may be English or community language depending on the service/ organisation
- Utilise relevant information technology effectively in line with work health and safety (WHS) guidelines

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, the Range Statement and the Assessment Guidelines for this Training Package.

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EVIDENCE GUIDE

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace setting under the normal range of workplace conditions • Assessment must include assessment of competency in dealing with a range of existing and new clients
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resources required for assessment include access to relevant workplace or simulated realistic workplace setting where assessment may take place
Method of assessment:	• Assessment may include observations, questioning or evidence gathered from the workplace e.g. testimonial from clients and colleagues, promotional material etc.

Range Statement

RANGE STATEMENT

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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. Add any 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.

Client services are:	• Specific to the organisation
Clients may include:	• Self referral or referred • Individual members of the public • Other organisations, community groups and individuals • Other work areas of the organisation • Senior management
Special client needs could relate to:	• Disabilities • Language • Gender • Culture • Age • Location

Unit Sector(s)

Not Applicable

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CHCFAM504C Respond to and contain critical incidents

Modification History

Version 3	Version 4	Comments
CHCFAM504B Respond to and contain critical incidents	CHCFAM504C Respond to and contain critical incidents	Unit updated in V4. ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Unit Descriptor This unit of competency describes the skills and knowledge required to manage situations that threaten the safety and security of clients, colleagues and others

Application of the Unit

Application The skills and knowledge described in this unit may apply to a range of situations in delivery of community services where safety and security of clients, colleagues and others may be threatened

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

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Employability Skills Information

Employability Skills This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and monitor indicators of potential incidents	1.1 Anticipate potential *causes of incidents* and harmful behaviour 1.2 Identify causes of incidents and *assess these for relevance to safety* of those people in the work environment 1.3 Identify and provide *information on potential responses* to colleagues for action and support
2. Respond to incidents	2.1 Respond confidently and in accordance with organisation procedures 2.2 Request assistance clearly 2.3 Use security procedures and aids according to policy 2.4 Ensure individual responses promote calm and reassurance 2.5 Prioritise client safety
3. Contain incidents	3.1 Provide information designed to promote positive decision-making based on the relationship between actions and consequence 3.2 Use calm, confident and assertive communication

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ELEMENT	PERFORMANCE CRITERIA
	to establish positive personal interaction and exchange information
	3.3 Select response and action designed to minimise risk, prevent escalation and to preserve the safety and security of all involved
4. Minimise the impact of critical incidents	4.1 Administer *assistance* as necessary
	4.2 Ensure procedures used to protect clients and others from endangering themselves or others, are consistent with legal, ethical and organisation requirements, and safety considerations
	4.3 Ensure responses and emergency action give priority to the protection of individuals from severe harm
	4.4 Promptly provide accurate and clear *reports* to the appropriate authority
	4.5 *Provide debriefing and support* to clients and colleagues immediately following a crisis incident
	4.6 Manage prevention of repeat incidents by review of clients continued involvement with the organisation and refer to other services where appropriate
	4.7 Review and modify policy and procedures for response to critical incidents

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

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REQUIRED SKILLS AND KNOWLEDGE

These include knowledge of:

- Negotiation and conflict resolution strategies to be employed at times of crisis involving clients and colleagues
- Knowledge and understanding is required of the workplace work health and safety (WHS) system sufficient to recognise situations affecting WHS and to take appropriate action to rectify the situation
- Rights and responsibilities of workers and clients to ensure the safety of individuals in the workplace and in accordance with any duty of care requirements
- Emergency procedures/protocols and how to access emergency services in the workplace
- Team roles and responsibilities for reporting requirements
- Worker responsibilities for child protection reporting and duty of care as result of crisis situations in the work environment
- Code of conduct for workers of the organisation or professional membership and actions for responding to crisis
- Aware of verbal and non-verbal presentation and responses in crisis response and management
- Standard organisation procedures in case of hostile clients
- Creative responses to workplace challenges at times of crisis
- Aware of cultural variations in responding to situations and behaviours
- Understand legal boundaries of interventions
- Awareness of indicators of potential critical incidents and crisis
- Appropriate contact procedures for emergency services as required

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Use communication skills to defuse hostile situations:
  - listening and understanding
  - speaking clearly and directly
  - interpreting the needs of internal and external clients of the organisation
  - negotiate responsively
  - persuade effectively
  - being appropriately assertive
  - empathising
- Select communication skills for sensitive and effective approaches with both vulnerable and hostile adults and children in crisis situations
- Manage and respond to hostile and aggressive behaviour in accordance with organisation policy and ensuring the safety of clients, colleagues and self
- Undertake situational risk assessments of potential crisis events involving clients and/or

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REQUIRED SKILLS AND KNOWLEDGE

colleagues
- Undertake problem solving under pressure applying a range of strategies either individually or in a team environment
- Resolve client concerns relative to workplace responsibilities
- Implement appropriate corrective action as much as possible to eliminate risk
- Correctly use safety and/or alarm systems is implemented where necessary
- Accurately complete incident and hazards records to meet organisation and workplace safety requirements
- Apply flexible and resourceful approaches to management of crisis situations involving vulnerable parties
- Manage issues of threat or risk which may be associated with involuntary clients

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, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of *specified* essential knowledge as well as skills • Observation of workplace performance is essential for assessment of this unit. however, simulated workplace assessment is acceptable • Consistency of performance should be demonstrated over the required range of situations relevant to the workplace • Where, for reasons of safety, space, or access to equipment and resources, assessment takes place away from the workplace, the assessment environment should represent workplace conditions as closely as possible
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work

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EVIDENCE GUIDE

	• All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• In cases where the learner does not have the opportunity to cover all relevant aspects in the work environment, the remainder should be assessed through realistic simulations, projects, previous relevant experience or oral questioning on 'What if?' scenarios • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on essential knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a period of time and/or in a number of workplace settings, any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

Method of assessment:	• Observation in the workplace where possible *together with one or more of the following*:
	  • written assignments/projects or questioning should be used to assess knowledge
	  • case study and scenario as a basis for discussion of issues and strategies to contribute to best practice
	• The assessment environment should not disadvantage the candidate
	• Assessment practices should take into account any relevant language or cultural issues related to Aboriginality, gender or language barriers other than English
	• Where the candidate has a disability, reasonable

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EVIDENCE GUIDE

	adjustment may be applied during assessment • Language and literacy demands of the assessment task should not be higher than those of the work role

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. Add any 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.

Causes of incidents may include actions and events from:	• Others which jeopardises the safety and well being of clients, colleagues and others with in the work environment • History of alleged or substantiated issues of child protection nature • History of domestic and family violence • Actual or potential violent behaviour • Incidents of self-harm and suicidal behaviour • Inappropriate expressions of intense anger and/or fear • Unauthorised entry to services • Hostage taking • Bomb threats to individuals and/or services • Threats of intimidation • Engaging hostile involuntary clients
Assess these for relevance to safety may include:	• Obtaining information about individuals or group posing threats or hostility • Ensuring children and other vulnerable client groups are able to be easily and immediately removed from potential or real crisis situations • Determining the most appropriate and accessible

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RANGE STATEMENT

	escape exits in a crisis • Identifying the need for additional staff is required to ensure safety of individuals • Awareness of immediate environment and indicators of crisis situations as listed above. • Analysing communication exchanges and behaviours of clients to determine levels of risks

Information on potential responses may include:	• Separating parties in conflict
	• Defusing strategies:
	  • talking with individuals in a calm manner
	  • modelling negotiation
	  • empathising
	  • adopting silence where appropriate
	• Engaging specialist service interventions, eg, mental health services, drug and alcohol services
	• Seeking emergency services, e.g. ambulance, fire or police services
	• Cultural support specialists, e.g. elders, ministers of religions
	• Using communication skills including:
	  • listening and understanding
	  • speaking clearly and directly
	  • persuading effectively
	  • being appropriately assertive
	  • negotiating responsively

Assistance may include:	• Contacting support for the client or colleague affected by the incident e.g. significant others, emergency services, other services providers • Facilitating referrals to other services • Assisting with writing incident reports • Assisting the client to exit real or potential risk situations
Reports may include:	• Incident reports as determined by the organisations policies on critical incidents • Workplace Health and Safety reports relating to relevant legislation

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RANGE STATEMENT

	• Witness reports for legal action • Observational reports to contribute policy revision
Provide debriefing and support may include:	• Ensuring colleagues and clients have opportunity to talk through a structured debriefing process individually or in team environment • Allowing workers to self select timeout when required to ensure effective practices following a critical incident • Assisting workers to access external support services post critical incidents • Providing a list of potential services for individuals to access appropriate debriefing • Monitoring and providing peer support to workers affected by critical incidents

Unit Sector(s)

Not Applicable

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CHCINF505D Meet statutory and organisation information requirements

Modification History

CHC08 Version 3	CHC08 Version 4	Description
CHCINF505C Meet statutory and organisation information requirements	CHCINF505D Meet statutory and organisation information requirements	Unit updated in V4. ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Descriptor This unit describes the knowledge and skills required to ensure effectiveness and efficiency of the organisation's information system

Application of the Unit

Application This unit may apply to work in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

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Employability Skills Information

Employability Skills This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. *Identify information requirements*	1.1 Identify information requirements in relation to organisation and worker goals, objectives and expected outcomes 1.2 Collect, analyse and prepare data on information needs in ways to inform decision-making
2. Review options for systems to obtain information	2.1 Identify and periodically evaluate sources of information 2.2 Identify, evaluate and prepare options for information systems so users can contribute to their development 2.3 Identify and evaluate *financial and technological resources* required for systems
3. Establish and manage systems to record and store information	3.1 Periodically re-evaluate methods used to record and store information for effectiveness, efficiency, security and integrity and introduce new methods as necessary 3.2 Analyse any substantial breakdowns in methods of recording, storing and accessing information for cause and effect, and take corrective action 3.3 Establish and implement systems to ensure

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ELEMENT	PERFORMANCE CRITERIA
	availability of information especially for direct use of clients
	3.4 Monitor validity and usefulness of information and take appropriate actions for disposal or storage
4. Support and supervise the development of information and educational resources	4.1 Develop content and format guidelines in consultation with clients and other stakeholders, to guide production of education and information resources
	4.2 Recruit appropriate expertise to develop designated information and education resources
	4.3 Establish opportunities for information users to monitor and advise on ongoing development of information and education resources
5. Provide staff training	5.1 Determine staff training needs in relation to systems for information acquisition, recording and storage, and for preparing educational resources
	5.2 Organise training or retraining in accordance with the units of competency required, training needs analysis and organisation policy

Required Skills and Knowledge

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Application of information technology
- Workload analysis models/systems
- Operations of the agency
- Relevant policy and procedures and work systems
- Systems analysis models/theories

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- Relevant legislation relating to organisation and statutory information requirements
- Range of current and emerging information technology relevant to addressing organisation information requirements
- Consultation processes and techniques
- Communication dissemination models

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Assess information requirements for an organisation or department
- Design work systems that integrate technology and address organisation and statutory information requirements
- Design training processes to support introduction of new technology in work practices
- Demonstrate knowledge of applicable agency and legislative requirements processes listed in the Range Statement

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate application of skills in:
  - assessment of information needs
  - analysis
  - planning
  - consultation/facilitation
  - report writing
  - running reviews
  - accessing/researching current emerging technology
  - marketing technology
  - communication/dissemination strategies
- Utilise relevant information technology effectively in line with work health and safety (WHS) guidelines

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

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Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions This may include the use of languages other than English and alternative communications systems • Assessment must include all aspects of managing the organisation's information systems in the workplace
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resources required for assessment of this unit include access to: • an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment
Method of assessment:	• Assessment may include observations, questioning and evidence gathered from the workplace e.g. observation of recording systems, portfolios, testimonials from clients and colleagues

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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. Add any 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.

The contexts for managing information systems include:	• Management of a work unit/major program area
Managing information systems will be carried out within requirements established by:	• Commonwealth and state legislation • Organisation policy and procedures • Relevant program standards • Informal and formal arrangements with government, non-government and other service providers to obtain information relating to clients and services • Computer based recording systems • Electronic banking
Financial and technological resources required may include:	• Manual filing systems • Computerised filing software and hardware
Identify information requirements may include:	• Monitoring work output and relationship with obtaining outcomes, assessing availability of statistics to assist in monitoring workload, setting up dialogue with workers/supervisors about how to improve work practices through the use of information technology
Establishing systems to obtain information includes:	• Assessing available technology and its application to work practices • Identifying and preparing submissions for resources needed for new systems • Identifying training needs associated with implementation of new systems and either developing training to support this or investigation of possible training service providers

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Unit Sector(s)

Not Applicable

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CHCORG501B Facilitate workplace change and innovation

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to facilitate change and innovation as a basis for achievement of organisation and strategic objectives

Application of the Unit

Application	The skills described in this unit may be applied across a range of community services workplace contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential	The Performance Criteria specify the level of

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outcomes of a unit of competency.	performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Support staff to identify areas for *workplace change*	1.1 Implement ongoing continuous improvement processes to review relevance and effectiveness of workplace processes and systems 1.2 Identify potential for change in order to more effectively achieve organisation's objectives and contribute to meeting client and stakeholder needs 1.3 Work collaboratively with staff to foster innovation and generate ideas for improved processes, practices and/or systems 1.4 Acknowledge staff contributions and provide *support* and guidance to build on and enhance ideas in positive and beneficial ways 1.5 Review and discuss potential outcomes of identified changes and their alignment with client needs and issues and with organisation's values, philosophy and strategic objectives 1.6 Identify and discuss potential barriers to change and determine strategies to address identified challenges during the change implementation process
2. Facilitate implementation of change in the workplace	2.1 Consult and negotiate with relevant stakeholders to facilitate understanding of and agreement with planned changes being implemented 2.2 Undertake risk assessment prior to implementing change and communicate risks to involved stakeholders 2.3 Ensure staff have a clear understanding of the purpose and nature of changes being implemented and implications specific to their work practices 2.4 Provide support as required to facilitate implementation of agreed changes 2.5 Address barriers and challenges to changes as required and in consultation with relevant stakeholders

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ELEMENT	PERFORMANCE CRITERIA
	2.6 Demonstrate acceptance of failure in trials of ideas or changes and focus on resolving issues and minimising impacts on clients and risk and cost to the organisation
3. Review the impacts of change and innovation in the workplace	3.1 Put in place processes to enable ongoing review of outcomes of change against expectations and previous outcomes or performance
	3.2 Ensure prompt action is taken to address issues where changes have a negative impact
	3.3 Identify and implement measures, where required, to enhance the implementation of change
	3.4 Acknowledge, reinforce and promote the benefits of effective changes achieved

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- A range of approaches to planning and management of workplace change and innovation
- Consultation and collaboration mechanisms appropriate to the workplace
- Funding/income strategies
- Principles and practices of change management theory
- Relevant government policies and systems
- Scope and outcomes of the workplace

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REQUIRED SKILLS AND KNOWLEDGE

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Consult and work collaboratively with staff to plan and implement change and innovation
- Identify and address barriers to change in the workplace
- Implement organisation continuous improvement policies and procedures
- Review and adjust implementation of change
- Support and guide effective change in the workplace, including celebration of success and acceptance of failure

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate application of skills in:
  - continuous improvement principles and practices
  - literacy
  - communication and negotiating with relevant decision-makers and stakeholders associated with change
  - community consultation
  - planning and review processes
  - coordinating a complex range of issues and relationships
  - analysis
  - leadership and motivation
  - service quality maintenance
  - cost management
  - effective and safe facilitation of workplace change
- Facilitate processes to recognise and address environmental responsibility and sustainable practice issues

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace under the normal range of workplace conditions • It is recommended that assessment take place on more than one occasion or evidence gathered that provides evidence of competence over a period of time
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resource requirements for assessment of this unit include access to an appropriate workplace where assessment can be conducted
Method of assessment:	• Assessment may include observations, questioning and evidence gathered from the workplace

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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. Add any 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.

Workplace change may relate to:

- Community expectations
- Levels and sources of funding
- Management decision-making processes
- Nature and focus of service, programs and activities
- Service users/funding providers
- Staff requirements
- Technological changes
- Use and availability of resources
- Workplace policies and approaches
- Workplace processes, practices and systems

Support may include:

- Emotional support
- Organisation resources
- Professional guidance
- Training or related skills and knowledge development

Unit Sector(s)

Not Applicable

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CHCPOL403C Undertake research activities

Modification History

CHC08 Version 3	CHC08 Version 4	Description
CHCPOL403B Undertake research activities	CHCPOL403C Undertake research activities	Unit updated in V4. ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. No change to competency outcome.

Unit Descriptor

Descriptor This unit describes the knowledge and skills required to implement research relevant to operations of the organisation and/or the community

Application of the Unit

Application This unit may apply in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills This unit contains Employability Skills

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Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare a research plan	1.1 Ensure views and interests of *stakeholders* are reflected in the research methodology and it and is compatible with ethical considerations 1.2 Select research methodology suitable to needs, purposes and resources and to maximise credibility of outcomes 1.3 Select and use research strategies appropriate to client group, subject matter being researched, the outcomes sought and the resources available 1.4 Ensure research plan incorporates strategies for validating research outcomes
2. Implement appropriate research strategies	2.1 Select and use research strategies appropriate to subject matter being researched, the outcomes sought and the resources available 2.2 Determine and allocate resources needed to conduct research 2.3 Ensure collection, recording and storage of all relevant information is timely and will ensure validity, confidentiality and security 2.4 Identify a representative range of people and groups with an interest in the issues and consult them in appropriate ways to ensure validity of outcomes 2.5 Undertake consultation according to agreed practices and protocol of own and other agencies 2.6 Consider cultural sensitivities and ethical issues in

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ELEMENT	PERFORMANCE CRITERIA
	all consultation
3. Organise and analyse information	3.1 Organise information in a form that allows analysis and suits the research purposes 3.2 Develop patterns in the data and derive explanations, maintaining validity and reliability
4. Report the findings of the research	4.1 Report complete and accurate details of the research methodology, information and analysis in an accessible and useable style and format 4.2 Provide opportunities for validation of research findings 4.3 Report research results and make them available to all relevant stakeholders

Required Skills and Knowledge

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Current and suitable research methodologies, including community based research and participatory research
- Research interview techniques, including consultation methods, protocols and practice
- Information systems, manual and electronic
- Report presentation
- Cultural implications of research methods
- Cultural analysis of information
- Cultural knowledge and ownership issues

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- Research ethics

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Carry out research activities that are directly relevant to the organisation and/or the community

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate application of skills in:
  - consultation methods
  - complex communication
  - negotiation with a wide range of known and unknown stakeholders
  - interpretation and analysis of data
  - networking
  - written/oral presentation
- Utilise relevant information technology effectively in line with work health and safety (WHS) guidelines

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions This may include the use of languages other than English and alternative communication systems • It is recommended that assessment take place on one or more occasions but must include all aspects of research activities - preparing, implementing, analysing, and reporting on research

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Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resource requirements for assessment of this unit include access to: • an appropriate workplace where assessment can take place, or simulation of realistic workplace setting for assessment
Method of assessment:	• Assessment may include observations, questioning and evidence gathered from the workplace

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. Add any 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.

The contexts for undertaking research may include:	• Preparation of a range of organisation information for policy development, strategic planning, marketing and promotion services, planning new services, reviewing existing services, providing advice to

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	management • Responsibility for research specific to a service, its stakeholders, interests and relationship with the wider community • Specific community or client interests and issues
Stakeholders may be:	• Within the organisation • Within the community • In other areas of delivery and other services, agencies • In the education/training field • Other specialists • Management • Community leaders • Recipients of the service delivery

Unit Sector(s)

Not Applicable

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CPPDSM4047A Implement and monitor procurement process

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

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 may form part of the licensing requirements for persons working in the property industry, including in the real estate, business broking, stock and station agency and property operations and development sectors, in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of those involved in implementing and monitoring purchasing processes for goods and services.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units

Nil

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Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Determine procurement requirements.	1.1 ***Procurement*** requirements and objectives are identified and confirmed according to ***organisational and legislative requirements***.
	1.2 Relevant ***information*** is gathered and reviewed to determine appropriate ***procurement process*** and time lines according to legislative requirements.
	1.3 ***Factors likely to affect procurement objectives*** are identified and agreed with ***relevant people*** according to organisational procedures.
	1.4 Personal limitations of authority are identified and ***appropriate approvals*** gained as required according to organisational and legislative requirements.
2 Implement and monitor procurement process.	2.1 Procurement process is systematically monitored and variations to supply are agreed with relevant people according to organisational requirements.
	2.2 Effective ***communication channels*** are used to ensure an effective and 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

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ELEMENT	PERFORMANCE CRITERIA
	according to organisational requirements, making efficient use of time and ***resources***.
3 Finalise procurement process.	3.1 Procurement process is finalised within agreed timeframes according to organisational requirements.
	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 according to organisational requirements.
	3.4 ***Business equipment and technology*** are used to maintain systems, ***records and reports*** according to applicable OHS, organisational and legislative requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- communication skills to discuss and confirm procurement arrangements, interpret written and oral information, liaise with suppliers and obtain feedback
- computing skills to access the internet and web pages, prepare and complete online forms, lodge electronic documents and search online databases
- interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds and varying physical and mental abilities
- literacy skills to interpret written and oral information, including procurement policies and procedures; and access and understand a variety of information
- organisational skills to coordinate work schedules and time lines
- technology skills to complete documentation and maintain records, reports and a database of information about suppliers.

Required knowledge and understanding:

- benefits and risks of a range of procurement options, such as lease, purchase, sale and leaseback, and term contract
- best practice procurement principles
- implications of warranties, guarantees and exclusions
- key principles of procurement, including:

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REQUIRED SKILLS AND KNOWLEDGE

- accountability and recording
- ethics and fair dealing
- open and effective competition
- planning and professionalism
- value for money
- limitations of work role, responsibility and professional abilities
- organisation's policies and procedures for employment and tendering of services and procurement
- relevant Australian standards
- relevant federal and state or territory legislation and local government regulations related to:
  - anti-discrimination
  - consumer protection
  - environmental issues
  - equal employment opportunity (EEO)
  - financial probity
  - franchise and business structures
  - industrial relations
  - OHS
  - property sales, leasing and management
- tendering and contracting processes, including a range of contractual arrangements
- user needs and requirements for facilities
- whole of life costing and price-quality relationship issues.

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, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment	This unit of competency could be assessed through practical demonstration of implementing and monitoring purchasing processes for goods and services. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge

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and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

A person who demonstrates competency in this unit must be able to provide evidence of:

- accurately reviewing procurement objectives and relevant information to determine procurement processes, and sourcing appropriate authority or delegations for procurement
- finalising procurement process within agreed timeframes and using business equipment and technology to maintain records and reports
- knowledge of organisation's practices, ethical standards and legislative requirements associated with implementing and monitoring purchasing processes for goods and services
- using communication to monitor effectively the implementation of the procurement process against budget parameters.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal planner and assessment record book
- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's

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competence

- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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 in the performance criteria is detailed below. Add any 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.

Procurement may include:

- common use contracts
- facilities management
- franchising
- gainsharing and open book
- incentive contracting
- leasing and buying
- maintenance and support arrangements
- pre-qualification of suppliers
- prime contractors and subcontractors
- research and development
- short-term or long-term arrangements
- sole or multiple suppliers
- standard form agreements

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- standing orders.

Organisational requirements may be outlined and reflected in:

- access and equity principles and practice guidelines
- business and performance plans
- complaint and dispute resolution procedures
- goals, objectives, plans, systems and processes
- legal and ethical requirements and codes of practice
- mission statements and strategic plans
- OHS policies, procedures and programs
- policies and procedures in relation to client service
- quality and continuous improvement processes and standards
- quality assurance and procedure manuals.

Legislative requirements may be outlined and reflected in:

- Australian standards
- general duty of care to clients
- home building requirements
- privacy requirements
- relevant federal, and state or territory legislation that affects organisational operation, including:
  - anti-discrimination and diversity
  - environmental issues
  - EEO
  - industrial relations
  - OHS
- relevant industry codes of practice covering the market sector and industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas and electricity), and contract or common law
- strata, community and company titles
- tenancy agreements
- trade practices laws and guidelines.

Information may relate to:

- budgets and operating costs
- contracts and tender documentation
- facility and asset management plans
- goods and services
- legal documentation
- maintenance plans and strategies
- management policy and procedures
- organisational and business strategic plans
- procurement guidelines, practices and policies
- property drawings
- quotations and invoices

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- register of suppliers
- tenancy and other contracts.

Procurement process may include:

- advertisement
- complying and non-complying tendering
- direct appointments
- open quotations
- register of suppliers.

Factors likely to affect procurement objectives may relate to:

- budgetary constraints
- collaborative arrangements
- environmental issues
- factors and conditions that may affect supply
- industry involvement requirements
- leasing instead of up-front capital investment
- level of risk, complexity and sensitivity of information related to procurement
- political imperatives and strategies
- potential impact of intended contracting activity
- strategic and tactical issues
- supply market capacity, structure, maturity and strength.

Relevant people may include:

- agents
- clients
- colleagues
- government personnel
- legal representatives
- members of industry associations
- property and facility owners or managers
- supervisors
- technical experts
- tenants.

Appropriate approvals may be sought from:

- agents
- authorised delegations
- clients
- solicitors
- supervisors.

Communication channels may include:

- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- organisational networks.

Resources may include:

- contractors
- facilities
- information technology

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- materials
- personnel
- professional service providers
- services
- tools and equipment
- transport.

Business equipment and technology may include:

- computers
- data storage devices
- email
- facsimile machines
- internet, extranet and intranet
- photocopiers
- printers
- scanners
- software applications, such as databases and word applications.

Records and reports may include:

- contracts and tenders
- electronic or paper-based information
- invoices
- logs and journals
- organisational forms
- procurement forms and reports
- quotations
- radio and telephone records
- records of conversation
- running sheets
- statements
- task allocation sheets.

Unit Sector(s)

Unit sector Property development, sales and management

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Competency field

Competency field Property operations and development

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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.

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Elements and Performance Criteria

1	Identify waste.	1.1	***Waste characteristics*** are identified.
		1.2	Types of wastes are differentiated by ***waste stream*** or ***waste categories***.
		1.3	***Hazardous and dangerous waste*** and ***non-conforming waste*** are detailed.
		1.4	***Contaminants*** 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	***Other potential hazards and risks*** 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

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    - 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

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  - 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	A person who demonstrates competency in this unit must be able to provide evidence of the required skills and knowledge specified in this unit. In particular the person should demonstrate the ability to: • 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	Assessment of essential underpinning knowledge may be conducted in an off-site context. It is to comply with relevant regulatory or Australian standards' requirements. Resource implications for assessment include: • 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

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	waste and hazards. Assessment methods must: • 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	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. 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. This unit could be assessed on its own or in combination with other units of competency relevant to the job function, for example: • 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.

Waste characteristics may include:	• density • level of contamination • quality • shape • size • volume • weight.
Waste stream may include:	• construction and demolition • dangerous goods

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	• green waste • hazardous substances • municipal waste.
Waste categories may include:	• 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:	• 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:	• contamination • hazardous or dangerous waste • inferior quality and unacceptable waste streams.
Contaminants may include:	• sunlight • infestation • mixing waste types • rot or mould • waterlogging.
Other potential hazards and risks are those that may lead to**:**	• 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:	• broken glass • compaction equipment • contamination • dust • fire • hazardous waste (e.g. sharps) • narrow driveways • other vehicles and equipment • overhanging signs

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	• projectiles • spark-producing equipment • unguarded conveyor belts • weather.

Unit Sector(s)

Waste management

Custom Content Section

Not applicable.

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CUFWRT401A Edit texts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to edit written material. People in editorial roles refine and amend text to enhance the clarity of written communication. They may also be involved in making decisions about the placement of visual material in relation to text. When editing text, they take into account the needs of the readership, the author's intention, available resources and the type of publication. A thorough knowledge of grammar, syntax, spelling and punctuation is essential, along with an eye for detail and a systematic approach to work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit covers the role of editors or subeditors working in contexts such as book publishing, magazines and journals, corporate, online media, government and not-for-profit organisations. It also covers the role of freelance editors. Even though people in this role work with a fair degree of autonomy, they report to a manager or, in the case of freelance editors, to a client.

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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**
Prepare to edit written content	1. In consultation with ***relevant personnel*** clarify the scope of editing tasks, including timelines 2. Determine style or tone appropriate to the ***publication*** or type of ***communication materials*** 3. Identify factors that have implications for the way content will be edited
Enhance clarity of written communication	4. Amend text according to the principles of ***clear language*** and ***logical structure***

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ELEMENT	PERFORMANCE CRITERIA
	5. Ensure that language level is appropriate to target audience 6. Ensure that ***tone*** is consistent with theme and purpose of the communication 7. Review punctuation to ensure clarity of meaning and ease of reading 8. Review written material for correct use of ***grammar and syntax*** 9. Monitor text for non-inclusive or potentially offensive language 10. In consultation with relevant personnel, clarify areas where content is unclear and amend accordingly, giving due consideration to preserving the integrity of the author's voice as amendments are made 11. Amend text for consistency where additional information has been incorporated 12. Mark up text according to enterprise procedures
Finalise editing process	13. Check accuracy of ***references*** and organise ***copyright clearances*** as required 14. In consultation with relevant personnel, finalise the format and placement of ***visual material*** as required 15. Submit final edited material to relevant personnel by agreed deadline 16. Evaluate editing process, assessing one's own performance and noting areas for future improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• ability to work as a member of a team in producing communications materials
• initiative and flexibility sufficient to:
  • edit material for purpose and structure
  • negotiate changes to written material aimed at enhancing the quality of final products
• proficient use of word processing and other software tools

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REQUIRED SKILLS AND KNOWLEDGE

• communication and literacy skills sufficient to:
  • interpret and clarify written or verbal instructions
  • apply correct grammar, spelling and punctuation when editing
  • edit communication materials with an understanding of audience or reader needs and expectations
  • apply proofreading skills
  • apply appropriate publishing and presentation formats
  • apply non-discriminatory language
• self-management and planning skills sufficient to:
  • prioritise work tasks
  • meet deadlines
  • seek expert assistance as required, e.g. on issues that could lead to legal action

Required knowledge

• industry knowledge, including:
  • roles and responsibilities of project team members
  • issues and challenges that arise when editing text
  • principles involved in the integration of visuals and text
  • principles for writing and editing in plain English
  • rules and conventions for written English, as defined by general and specialist dictionaries and grammar books, and enterprise or government style guides
• effective communication techniques, including effective listening, questioning and non-verbal cues
• legislation, codes of practice and standards sufficient to identify:
  • intellectual property issues
  • copyright and copyright clearance requirements
  • privacy issues
  • editing standards
  • discriminatory or potentially offensive language issues
• OHS standards as they relate to working for periods of time on computers

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.

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EVIDENCE GUIDE	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• examples of edited written material that:
	  • demonstrate correct application of grammatical and punctuation conventions
	  • are free of spelling errors
	  • are coherent and clear to read
	  • are presented in a format appropriate to the stipulated audience and purpose
	• ability to work to deadlines
	• collaborative approach to work
	• attention to detail.

Context of and specific resources for assessment	Assessment must ensure: • access to a computer and the internet • access to a range of information, publication and communications material sources as listed in the range statement • provision of workplace sample documents or workplace-oriented simulation case studies or scenarios • access to appropriate learning and assessment support when required • use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • evaluation of a range of written material edited by the candidate, which involves comparing the original and final edited copy • case studies and problem-solving exercises to determine ability to correctly apply grammatical and punctuation conventions • written or oral questioning to test knowledge of principles for writing and editing in plain English • written or oral questioning to test knowledge as listed in the required skills and knowledge section of this unit • review of portfolios of evidence and third-party

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EVIDENCE GUIDE	
	workplace reports of on-the-job performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCRT402A Collaborate in a creative process • CUFWRT301A Write content for a range of media • CUFWRT302A Write simple stories • CUFWRT402A Write extended stories • CUFWRT403A Write narration and current affairs material.

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.	
Relevant personnel may include:	• author • client • editor • graphic artist • graphic designer • manager • marketing and publicity personnel • permissions department personnel • producer • subeditor • typesetter.

Publications may include:	• books
	• corporate documents:
	  • reports
	  • newsletters
	  • marketing and promotional materials, including online

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RANGE STATEMENT	

	• print and online publications:
	  • literary
	  • magazines
	  • journals
	  • newspapers.

Communication materials may include:	• content written for a range of interactive media, such as:
	  • websites
	  • e-learning resources
	  • games
	• essays
	• extended non-fiction writing, including biography
	• feature articles or profiles
	• fiction writing:
	  • short stories
	  • novels
	  • novellas
	• information articles and features
	• life writing or autobiography
	• literary non-fiction
	• marketing materials
	• poetry
	• reports and memos
	• scripted material for broadcast:
	  • news items
	  • intros
	  • outros
	  • voice-overs and narration
	• writing for children:
	  • stories
	  • picture books
	  • novels
	  • non-fiction.

Principles of ***clear language*** may include:	• compliance with genre • consistency of tone • language that is free of: • verbosity

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RANGE STATEMENT	
	• ambiguity • unnecessary repetition • jargon • non-discriminatory language • use of plain English • use of words appropriate to the context.
Elements of ***logical structure*** may include:	• connections between phrases, clauses, paragraphs and sections • paragraph structure • sentence structure.
Tone may include:	• dramatic • entertaining • formal • humorous • informal or casual • informational.
Grammar and syntax may include application of:	• Australian Standards for Editing Practice - Council of Australian Societies of Editors • grammar and punctuation conventions as demonstrated by Australian Government Style Manual and other house style guides.
References may include:	• bibliography • footnote or endnote • index • list of references • table of contents.
Copyright clearances may be required for:	• fonts • quotations from: • literary works • song lyrics • visual material: • photos • illustrations • cartoons.
Visual material may include:	• cartoons • charts • diagrams • illustrations • logos

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RANGE STATEMENT	
	• photos.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units		

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CUFWRT402A Write extended stories

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to write extended stories. It builds on the skills covered in: • CUFWRT302A Write simple stories. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	People with the skills outlined in this unit are able to write extended stories in a range of contexts using appropriate structures and creative narrative development techniques. They could, for example, be writing stories for the print media, television, radio, animations, e-learning resources, games, and fiction or non-fiction projects. They are typically writing stories in response to creative conceptualisations or project briefs, which could be self-generated or developed by others. Examples of extended stories include fully developed non-linear stories for animations or games, learning resources with complex learning and assessment approaches, extended creative responses such as novels or novellas, and non-fiction projects such as biographies.

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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**
Analyse extended story writing requirements	1. Identify the components of a storytelling creative concept, brief or project, including target audience, ***format***, timeline and ***proposed outcomes*** 2. Consider factors such as style, tone and length in relation to ***purpose of the writing task*** 3. Decide on the most appropriate ***structuring technique*** for extended story writing tasks 4. Discuss with ***relevant personnel*** possible ***visual and aural storytelling structures*** if appropriate to storytelling tasks

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ELEMENT	PERFORMANCE CRITERIA
Prepare to write extended stories	5. Research extended and more complex stories from a range of ***creative works*** that may inspire story ideas to meet project requirements 6. Use ***information sources*** to research subject areas 7. Experiment with a range of narrative structures and writing styles and techniques 8. Develop extended ideas for characters, plots and settings 9. Develop complex scenarios, contexts and situations as required 10. Select the story structure, style, techniques and content that best meet the requirements of projects 11. Seek feedback from relevant personnel on proposed stories and refine approach as required
Draft extended stories	12. Draft extended stories using appropriate structuring, style and language 13. Use relevant formatting and presentation techniques 14. Proofread draft stories for appropriate grammar, punctuation and spelling 15. Submit draft manuscripts to relevant personnel for feedback and amend as required
Write final drafts	16. Evaluate extended stories in line with relevant ***criteria*** 17. Discuss and confirm with relevant personnel additional requirements or modifications to the story 18. Complete necessary amendments as required within agreed timelines 19. Evaluate story writing process, assessing one's own performance and noting areas for future improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• learning skills sufficient to improve performance and product through self-reflection and redrafting after feedback • proficient use of word processing and other software tools • communication, teamwork and literacy skills sufficient to:

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REQUIRED SKILLS AND KNOWLEDGE
• interpret creative concepts and briefs • write extended stories that engage specific audiences • use correct grammar, spelling and punctuation when writing • discuss story ideas with colleagues or clients • negotiate amendments to stories • respond positively to constructive feedback on draft stories • initiative and enterprise sufficient to: • develop original, innovative and creative approaches in the storytelling process • experiment with narrative styles and elements to develop a creative sustained vision • extend creative boundaries for self and audience • find creative solutions to problems identified during the process of story development • locate and use resources to broaden own creative experience • self-management and planning skills sufficient to: • prioritise work tasks • plan extended stories in a logical and cohesive way • meet deadlines • seek expert assistance as required
Required knowledge
• industry knowledge, including: • roles and responsibilities of project team members • issues and challenges that arise when writing extended stories • storytelling techniques appropriate to a range of extended story contexts • in-depth knowledge of storytelling narrative, structure and formats appropriate to audience and purpose • research techniques incorporating creative concept development and information compiling • media laws sufficient to identify defamation and obscenity and seek expert advice on issues that could lead to legal action • copyright clearance procedures and privacy protection procedures • OHS standards as they relate to working for periods of time on computers

Evidence Guide

EVIDENCE GUIDE

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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	Evidence of the following is essential: • writing of original extended stories applying appropriate format, and indicating creative engagement with extended storytelling techniques • ability to write extended stories that engage the target audience and meet requirements or purpose of a storytelling concept, brief or project.
Context of and specific resources for assessment	Assessment must ensure: • access to word processing software • access to a range of information sources as listed in the range statement • access to appropriate learning and assessment support when required • use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.
Method of assessment	The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance • evaluation of extended stories written by the candidate in line with relevant criteria as listed in the range statement • written or oral questioning to test knowledge of information sources • evaluation of creative and information research sources through report, journal or oral reporting.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCRT402A Collaborate in a creative process • CUFRES401A Conduct research • CUFWRT401A Edit texts.

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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.	

Formats may include:	• anthologies
	• fiction manuscripts
	• literary non-fiction extended features
	• non-fiction manuscripts for book projects
	• script templates
	• storyboards
	• sustained concepts, storylines and narratives for:
	  • plays
	  • musicals
	  • theatre
	  • dance
	  • television or radio
	  • newspapers
	  • journals
	  • magazines.

Proposed outcomes may include:	• children's or young adult novel or non-fiction
	• extended stories for:
	  • plays
	  • musicals
	  • theatre
	  • dance
	  • television or radio productions
	  • newspapers
	  • journals
	  • magazines
	  • anthologies
	  • websites
	  • animated film

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RANGE STATEMENT	
	• games • e-learning resources • non-fiction project, such as: • history • life story • biography • novel or novella • verse novel.
Purpose of the writing task may include:	• artistic response • creative idea transfer • education and training • entertainment • income generation • information transfer • personal development • persuasion • professional outcome • reporting • self-fulfilment.
Structuring techniques may include:	• characters • dialogue • pace • plot and subplots • point of view • setting • story mapping • storyboarding.
Relevant personnel may include:	• agents • asset creators • authors • clients • content experts • directors • editors • graphic designers • information architects • navigation designers • other writers • producers

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RANGE STATEMENT	
	• programmers • publishers • user interface designers • other technical/specialist staff.

Visual and aural storytelling structures may include:	• convergence of image, music and text
	• gestures and other non-verbal communication
	• metaphors, objects, icons and visual meaning
	• music and sound effects
	• musicality:
	  • rhythm
	  • beat
	  • accent
	• physicality
	• signs and meanings
	• visual characterisation
	• visual forms of storytelling.

Creative works may include:	• animations • comics • dance • fiction, including novels, novellas and longer short stories • films • music lyrics • musicals • newspapers, journals and magazines • non-fiction • plays • radio programs • television programs • theatre.
Information sources may include:	• colleagues • commercial enterprises • federal, state and local government departments • industry associations and organisations • industry practitioners and technical experts • internet • media outlets • organisational policies and procedures • personal observations and experience • publications, e.g.:

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RANGE STATEMENT	
	• reference books • newsletters and magazines • specialist technical journals • bulletins • press releases • letters • manufacturer handbooks, manuals and promotional material.

Criteria may include:	• appropriateness of characters and narrative plotting
	• appropriateness of dialogue
	• creative engagement with the format, techniques and style of stipulated extended stories
	• level of engagement with target audience
	• relevance of story content
	• relevance of the creative concept or project
	• soundness of the story's structure:
	  • linear
	  • non-linear
	  • experimental.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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FNSACC301 Process financial transactions and extract interim reports

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 prepare and process routine financial documents, prepare journal entries, post journals to ledgers, prepare banking and reconcile financial receipts, and extract a trial balance and interim reports.

It applies to individuals who use specialised knowledge and follow agreed processes to carefully check and process detailed financial information to ensure standards are maintained.

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

Accounting

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. Check and verify supporting documentation	1.1 Identify, check and record information from documents 1.2 Examine supporting documentation to establish accuracy and completeness and to ensure authorisation by appropriate personnel
2. Prepare and process banking and petty cash	2.1 Enter accurately and balance deposits and withdrawals according to organisational procedures

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ELEMENT	PERFORMANCE CRITERIA
documents	2.2 Check cheques and card vouchers for validity before processing 2.3 Reconcile banking documentation with organisation's financial records 2.4 Check, process and record petty cash claims and vouchers, and balance petty cash book according to organisational procedures
3. Prepare and process invoices for payment to creditors and for debtors	3.1 Prepare invoices in accordance with organisational procedures 3.2 Check invoices against source documents for accuracy and correct any errors 3.3 File all invoices and related documents for auditing purposes
4. Prepare and post journals and batch monetary items	4.1 Prepare journals accurately and completely, and batch items within organisational timelines 4.2 Match batch items precisely to initial receipt records 4.3 Ensure journals are authorised by appropriate person and process in accordance with organisational policy and procedures
5. Post journals to ledger	5.1 Post journals accurately to ledger in accordance with organisational input standards, with transactions correctly allocated to system and accounts
6. Enter data into system	6.1 Enter data accurately into system in accordance with organisational input standards and correctly allocate transactions to system and accounts 6.2 Update related systems to maintain integrity of relationships between financial systems
7. Prepare deposit facility and lodge flows	7.1 Select deposit facility appropriate to banking method to be used 7.2 Balance batch with deposit facility without error 7.3 Take security and safety precautions appropriate to method of banking, in accordance with organisational policy and industry and legislative requirements 7.4 Obtain and file proof of lodgement so that it is easily accessible and traceable
8. Extract trial balance and interim reports	8.1 Process accurately any special transactions 8.2 Complete cash and credit journals and post to general ledger 8.3 Extract and check trial balance and prepare other required reports

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ELEMENT	PERFORMANCE CRITERIA
	8.4 Find and correct any errors

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, 2.2, 2.4, 3.2, 4.2, 8.4	• Analyses, matches and interprets information, paying attention to detail to identify errors
Writing	1.1, 2.1, 2.4, 5.1, 8.2, 8.3	• Records information accurately using correct spelling, grammar and terminology
Oral Communication	4.3	• Uses questioning and active listening to convey and clarify information and instructions
Numeracy	1.1, 2.1-2.4, 3.1, 3.2, 4.1, 7.2, 8.1, 8.2	• Performs mathematical calculations to check accuracy and completeness and reconcile numerical and financial data
Navigate the world of work	2.1, 2.4, 3.1, 4.3, 5.1, 7.3	• Follows legislative requirements, and organisational protocols, policy and procedures relevant to own role
Interact with others	1.2, 4.3	• Uses correct communication practices and protocols to gain processing authorisations from relevant personnel
Get the work done	1.1, 2.1-2.4, 3.1-3.3, 4.1-4.3, 5.1, 6.1, 6.2, 7.1-7.4, 8.1-8.4	• Plans, organises and implements tasks according to organisational and legislative requirements • Responds to predictable routine problems by implementing standard or 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
FNSACC301 Process	FNSACC301A Process	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
financial transactions and extract interim reports	financial transactions and extract interim reports	Standards for Training Packages	

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSACC301 Process financial transactions and extract interim reports

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:

- accurately enter and balance deposits and withdrawals
- process and balance petty cash transactions
- check and verify supporting documentation
- apply relevant security measures for preparing and banking receipts
- batch monetary items and prepare deposit facilities
- accurately enter data into accounting systems and process journal entries according to organisational policy and procedures and legislative requirements
- prepare and authorise journals and check journal processing reports
- extract, check and correct a trial balance
- file documentation to meet all organisational and regulatory 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:

- identify a range of accounting conventions, processes and procedures
- describe banking procedures and guidelines
- outline typical errors that can be made in processing financial transactions
- describe forms of ‘proof of lodgement’
- describe types of ‘special transactions’
- identify and describe the key features of:
  - industry codes of practice
  - legislative and regulatory requirements relevant to the work
  - organisational policy and procedures

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- explain the security procedures for handling cheques, vouchers and cash
- describe the key features of a range of reports.

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:

- 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

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FNSACC403 Make decisions in a legal context

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 make decisions, particularly 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 their area of 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Examine legal context for financial services work	1.1 Identify Australian legal systems and processes 1.2 Identify functions of courts and other regulatory bodies 1.3 Identify implications of relevant legislation, regulation and legal precedent, and apply in making operational decisions 1.4 Seek advice and guidance to evaluate and moderate decision processes
2. Identify compliance requirements	2.1 Accurately interpret compliance requirements 2.2 Review legislative and regulatory sources of information

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ELEMENT	PERFORMANCE CRITERIA
	regularly to identify changes to compliance requirements
3. Develop procedures to ensure compliance	3.1 Develop procedures in consultation with others to address compliance requirements 3.2 Establish timetables to meet compliance requirements to align with statutory deadlines

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	• Categorises, consolidates and interprets complex regulatory and legislative information
Writing	1.4, 3.1	• Prepares documentation using clear language, formats and terminology specific to requirements, audience and purpose
Oral Communication	1.4, 3.1	• Participates in verbal exchanges using active listening and questioning to clarify thinking and elicit opinions of others
Navigate the world of work	1.3, 2.1, 2.2, 3.1	• Contributes to the development of procedures to meet legislative requirements • Identifies organisational implications of new or changed legislation or regulations
Interact with others	1.4, 3.1	• 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	1.3, 3.1, 3.2	• Organises work to meet organisational requirements, taking responsibility for process, compliance and schedule needs • Makes critical and non-critical decisions in relatively complex situations, taking relevant legislation, regulation and legal precedent into consideration • Uses the main features and functions of digital tools to complete work tasks

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSACC403 Make decisions in a legal context	FNSACC403B Make decisions in a legal context	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

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Assessment Requirements for FNSACC403 Make decisions in a legal context

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 information on relevant legislation, statutes, regulation and legal judgements
- draw conclusions, having regard to the facts and relevant law
- review and assist to develop 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

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

- identify and explain the 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
- identify and describe the main features of current legislation and its general impact on business operations in the areas of:
  - consumer law
  - corporations law, including different business organisational structures and regulations for:
    - public and private companies
    - trusts

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    - partnerships
    - sole traders
  - property law
  - superannuation law
  - taxation law
- identify the key decisions in case law and interpret 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:

- common office equipment, technology, software and consumables
- internet
- relevant legislative and regulatory 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

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FNSACC406 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 1.0.

Application

This unit describes the skills and knowledge required to modify and operate an integrated computerised accounting system. This is generally under supervision and encompasses processing transactions within the system, maintaining the system, producing reports and ensuring system integrity.

It applies to individuals who within their area of responsibility use specialised knowledge, information technology and coordination skills to establish and maintain an organisational system.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Implement integrated accounting system	1.1 Implement general ledger, chart of accounts and subsidiary accounts in accordance with organisational requirements, procedures and policy 1.2 Set up customers, suppliers and inventory items in system to

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ELEMENT	PERFORMANCE CRITERIA
	meet organisational requirements and reporting requirements of goods and services tax (GST) 1.3 Use appropriate technical help to solve any operational problems
2. Process transactions within system	2.1 Collate, code and classify input data before processing 2.2 Process wide range of cash and credit transactions in service and trading environment 2.3 Use general journal to make any balance day adjustments for prepayments and accruals 2.4 Regularly review system output to verify accuracy of data input and make adjustments for any detected processing errors 2.5 Perform end of financial year rollover
3. Maintain system	3.1 Add any new general ledger accounts, customer, supplier, inventory and fixed asset records as required 3.2 Maintain and update existing chart of accounts, 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 GST purposes as required or requested 4.2 Generate reports to ensure that subsidiary ledgers and accounts reconcile with general ledger 4.3 Generate reports, which ensure that bank account reconciles with bank statement, over at least two reporting periods
5. Ensure system integrity	5.1 Regularly back-up system to ensure against loss or corruption of data 5.2 Restore data from back-ups in event of loss or corruption of current data 5.3 Maintain secure record of all processed transactions for audit purposes

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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, 2.4, 3.1, 4.1-4.3	• Accesses, manages and analyses financial information and data from a range of sources and reports • Collates, codes and classifies data, checking for accuracy and reliability
Writing	1.2, 3.1, 3.2	• 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	1.3	• Uses questioning and active listening to clarify and convey information and instructions
Numeracy	1.1, 2.1-2.5	• Performs mathematical calculations and uses mathematical problem-solving strategies to analyse financial data and reports
Navigate the world of work	1.1, 1.2	• Recognises and complies with relevant legislative and regulatory requirements, protocols, policies and procedures
Get the work done	1.1-1.3, 2.1-2.5, 3.1-3.3, 4.1-4.3, 5.1-5.3	• 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 relevant legislation and regulation into consideration • Recognises and responds to predictable problems and implements solutions to issues that have the potential to impact on the data entry and reporting process • Uses digital systems and programs for planning, implementing, monitoring and reporting purposes • Implements security requirements related to the management of digital data

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status

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Code and title current version	Code and title previous version	Comments	Equivalence status
FNSACC406 Set up and operate a computerised accounting system	FNSACC406A Set up and operate a computerised accounting 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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSACC406 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 1.0.

Performance Evidence

Evidence of the ability to:

- set up an organisation's chart of accounts by modifying an established integrated financial software system
- implement an integrated accounting system, ensuring integrity of the data
- process transactions within the integrated system and generate reports and print, if required
- maintain the integrated 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:

- identify and describe the key features of organisational procedures and policy relating to operating a computerised accounting system
- identify and describe the key principles and practices of accrual and double-entry accounting
- explain the key requirements of relevant financial services industry legislation relating to computerised accounting systems
- identify and explain the key features and characteristics of information included in relevant source documents of financial data
- describe the key features of a chart of accounts.

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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:

- a range of common office equipment, technology, software and consumables
- an integrated commercial financial software system and associated data
- the internet.

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

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FNSCUS501 Develop and nurture relationships with clients, other professionals and third party referrers

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 communicate and network with a wide range of people, internal and external to the organisation, to increase efficiency, build continuing relationships and improve sales.

It applies to individuals who are responsible for relationship development and may use a range of specialised and managerial techniques to engage with others.

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

Unit Sector

Customer service

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. Develop professional business relationships	1.1 Conduct all dealings with clients, professionals and other third parties professionally in accordance with organisational policy and procedures, and legislative, regulatory and professional codes of practice 1.2 Develop and maintain positive relationships using organisation's social, business and ethical standards 1.3 Carry out dealings with colleagues, clients and other parties

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ELEMENT	PERFORMANCE CRITERIA
	effectively and with respect to confidentiality 1.4 Adjust interpersonal styles and methods to needs and situation of other parties
2. Build and maintain business networks and relationships	2.1 Develop and maintain business and professional networks and other relationships to benefit organisation 2.2 Identify and cultivate relationships using business and professional networks to promote and market organisation 2.3 Expand and enhance reputation of organisation in cooperation with other professionals and third parties, and identify new and improved business practices
3. Nurture relationships and build on referral business for the long term	3.1 Follow up referral business using appropriate communication channels to find and secure new business relationships 3.2 Identify referral needs quickly and provide information about organisation's relevant products and services 3.3 Organise interview with referral business where needs can be met, or identify other sources of information that may assist clients.

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	• Extracts and interprets relevant information from a range of structurally complex texts
Writing	3.1	• Produces a range of business documents according to organisational and regulatory requirements • Uses clear and logical language and relevant terminology to convey ideas and advice
Oral Communication	1.2,1.4, 2.1-2.3, 3.1-3.3	• Initiates effective spoken interactions using appropriate listening and questioning strategies to establish information and interest from others • Uses clear and detailed language to provide accurate advice and support to others
Numeracy	1.1, 2.3, 3.3	• Uses financial systems, interprets detailed financial texts and extracts relevant information for others

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Navigate the world of work	1.1–1.3	• Follows legislative requirements, organisational protocols, policy and procedures relevant to own role
Interact with others	1.1-1.4, 2.1-2.3, 3.1-3.3	• Selects and uses appropriate conventions and protocols when communicating with business and professional networks, adjusting personal communication style in response to the values, beliefs and cultural expectations of others • Collaborates and cooperates with others to build rapport and maintain business networks
Get the work done	1.1, 1.2, 2.1-2.3, 3.1-3.3	• Plans, organises and implements tasks to achieve organisation's promotion and networking objectives • Systematically gathers and analyses all relevant information and evaluates options to make decisions about building and maintaining business networks and relationships • Uses digital technologies and tools to access, store and share information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSCUS501 Develop and nurture relationships with clients, other professionals and third party referrers	FNSCUS501A Develop and nurture relationships with clients, other professionals and third party referrers	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

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Assessment Requirements for FNSCUS501 Develop and nurture relationships with clients, other professionals and third party referrers

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:

- liaise, develop and secure longstanding and effective relationships
- apply high level communication, negotiation, interpersonal and relationship management skills
- interpret and apply the goals, policies and procedures of the organisation
- monitor and introduce new ways to improve work relationships
- adapt to any special needs of clients, including cultural, language, race, religion, ethnic origin, socioeconomic status and demographic 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:

- outline the organisation's social, business and ethical standards relevant to building relationships and business
- explain the role of different communication channels and tools in relationship development
- describe effective interpersonal skills, and negotiation and communication principles
- identify relevant associations, conferences and other relationship building opportunities
- identify relevant business contexts for networking and relationship development
- outline the key requirements of relevant legislation, regulation and industry/professional codes of practice that apply to relationship management.

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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:

- common office equipment
- contact software system and data
- financial services product information.

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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
	goals being achieved, and types of behaviours and skills required for successful budgeting
2. Prepare to develop a personal budget	2.1 Record all income and expenses for a six-month period to assist in estimating expenditure requirements 2.2 Obtain or develop budget spreadsheet to record income and expenditure for relevant period of time 2.3 Identify and list all sources of income, regular fixed expenses and variable expenses for specified period in personal budget using budget spreadsheet
3. Develop a personal budget	3.1 Subtract total expenses recorded from total income to determine surplus or deficit budget for specified period 3.2 Explore reasons for deficit budget if relevant and investigate ways to reduce expenses or increase income 3.3 Explore allocation of surplus funds towards saving and meeting identified financial goals
4. Implement and monitor the personal budget	4.1 Follow budget according to plan for a period of time 4.2 Record actual expenses and income for period during which budget is implemented 4.3 Compare budgeted expenses and income with actual amounts and modify budget where necessary 4.4 Discuss handy hints for managing personal budget 4.5 Conduct ongoing review of budget to ensure it remains relevant and to ensure updates are incorporated if 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	1.1-1.3, 2.3, 3.2	• 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	• Accurately records and documents information relating to personal budgets using correct language, concepts and terminology

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Oral Communication	1.1-1.3, 4.4	• 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	• 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	• 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

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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

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- 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

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FNSFLT203 Develop knowledge of debt and consumer credit

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 understand the functions and implications of different forms of credit, and the strategies and methods to make appropriate and effective decisions regarding management of personal debt and use of credit facilities. 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 explore new ideas and techniques to build personal financial literacy knowledge.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify and discuss role of credit in society	1.1 Identify and discuss concepts and terminology of credit provided by financial institute and debt incurred by borrower 1.2 Identify historical and current role of consumer credit in Australian society and discuss advantages and disadvantages of

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ELEMENT	PERFORMANCE CRITERIA
	credit use 1.3 Discuss impact of consumer debt on national economy
2. Identify and discuss range of credit options available	2.1 Identify and compare types of credit facilities used by businesses 2.2 Identify and compare types of credit facilities used by individuals 2.3 Identify and discuss differences between unsecured and secured loans 2.4 Explain implications of default on secured loans to borrower
3. Identify and compare costs of using credit	3.1 Compare fees and costs associated with different types of credit options 3.2 Compare features and associated risks of fixed versus variable interest rates 3.3 Identify ways to compare advertised interest rates and effects of fees and charges
4. Identify and discuss effective use of consumer credit	4.1 Identify and discuss ways to avoid excessive or unmanageable debt 4.2 List strategies to minimise fees on credit 4.3 Discuss importance of meeting minimum payments on credit cards 4.4 Identify and discuss ways to avoid credit card fraud
5. Explain personal credit rating and history	5.1 Describe role of credit reference agencies 5.2 Explain purpose and use of credit reference reports in assessing loan applications 5.3 Identify and discuss implications of establishing a poor credit history 5.4 Describe methods of obtaining own credit reference report and discuss right to access the report

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

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	Criteria	
Reading	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.4, 5.1-5.4	• Researches, interprets and compares written information from a range of sources to identify key details relevant to the enquiry
Writing	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.4, 5.1-5.4	• Documents information accurately using correct spelling, grammar and terminology • Describes concepts accurately and in a format appropriate for the audience and purpose
Oral Communication	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.4, 5.1-5.4	• Participates in verbal exchanges using active listening and questioning to elicit information and develop a clear understanding
Numeracy	3.1-3.3, 4.2, 4.3	• Performs a range of mathematical calculations to interpret the impact of varying rates and charges and to compare financial information
Navigate the world of work	1.1-1.3, 2.1-2.4, 3.1-3.3, 4.1-4.4, 5.1-5.4	• Identifies, confirms and understands regulatory requirements • Maintains up-to-date knowledge of debt and consumer credit required for own situation
Get the work done	2.2, 2.2, 3.1-3.3	• Uses digital systems and tools to conduct research and complete tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSFLT203 Develop knowledge of debt and consumer credit	FNSFLT203A Develop understanding of debt and consumer credit	Updated to meet Standards for Training Packages Revised title 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

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Assessment Requirements for FNSFLT203 Develop knowledge of debt and consumer credit

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:

- clearly explain the role of credit in the community
- discuss the different types of consumer credit options currently available
- clearly explain the associated implications and risks of the various credit schemes available, as well as the implication of establishing a poor credit reference history.

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 key principles of lending and credit
- describe the role of credit in society
- outline the key role of financial institutions, regulatory bodies, credit reference agencies and consumer advisory bodies that are involved in the provision and management of credit
- list the advantages and disadvantages of credit
- list examples of fixed and revolving credit facilities
- describe the difference between secured and unsecured loans, and the implications of default on secured loans
- describe how to compare fees and costs, and list ways to minimise fees
- list ways to avoid credit card fraud
- define the term ‘credit reference report’ and describe how to get one
- list the implications of a poor credit rating.

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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
- internet to source information.

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

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FNSFLT203A Develop understanding of debt and consumer credit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to understand the functions and implications of different forms of credit and the strategies and methods to make appropriate and effective decisions regarding the management of personal debt and the use of credit facilities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit has wide application and may be used in workplaces, schools, adult and community learning organisations or registered training organisations in order 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.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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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. Identify and discuss the role of credit in society	1.1. The concepts and terminology of credit provided by a financial institute and debt incurred by a borrower are analysed and discussed 1.2. The historical and current ***role of consumer credit*** within Australian society is identified and ***advantages and disadvantages of credit*** use are analysed and discussed 1.3. The impact of consumer debt on the national economy is analysed and discussed
2. Identify and discuss the range of credit options available	2.1. Types of ***credit facilities*** used by businesses are analysed and compared 2.2. Types of credit facilities used by individuals are analysed and compared 2.3. ***Differences between unsecured and secured loans*** are analysed and discussed

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ELEMENT	PERFORMANCE CRITERIA
	2.4. ***Implications of default*** on secured loans are explained to the client
3. Identify and discuss costs of using credit	3.1. ***Fees and costs*** associated with different types of credit options are ***analysed and compared*** 3.2. The features and associated risks of fixed versus variable interest rates are analysed and compared 3.3. ***Ways to compare advertised interest rates*** and the effects of fees and charges are analysed and discussed
4. Analyse and discuss the effective use of consumer credit	4.1. Ways to avoid excessive or unmanageable debt are analysed and discussed 4.2. ***Strategies to minimise fees*** on credit are identified and discussed 4.3. The importance of meeting minimum payments on credit cards is analysed and discussed 4.4. ***Ways to avoid credit card fraud*** are identified, analysed and discussed
5. Manage personal credit rating and history	5.1. The role of credit reference agencies is analysed and discussed 5.2. The purpose and use of ***credit reference reports*** in assessing loan applications is analysed and discussed 5.3. ***Implications of establishing a poor credit history*** are analysed and discussed 5.4. The right to access and ***methods of obtaining own credit reference report*** are analysed and discussed

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • clearly explain debt and credit implications
  • use questioning to develop clear understanding
  • liaise with others, share information, listen and understand
  • use language and concepts appropriate to cultural differences
• numeracy and IT skills to:

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REQUIRED SKILLS AND KNOWLEDGE
• calculate credit costs and payments • use a calculator • use internet information • literacy skills for interpreting relevant information • learning skills to maintain knowledge of credit issues and management
Required knowledge
• principles of lending and credit • role of credit in society • the role of financial institutions, regulatory bodies, credit reference agencies and consumer advisory bodies that are involved in the provision and management of credit

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	Evidence of the ability to: • analyse and clearly explain the role of credit within the community • analyse and clearly explain the different types of consumer credit options currently available • analyse and clearly explain the associated implications and risks of the various credit schemes available, as well as the implication of establishing a poor credit reference history.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the the range statement • access to and the use of a range of common office equipment, technology, software and consumables • access to internet to source information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are

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EVIDENCE GUIDE	
	appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • verbal or written questioning on underpinning knowledge and skills • setting and reviewing simulations or scenarios • group discussion to determine and confirm understanding.
Guidance information for assessment	

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.	
The ***role of consumer credit*** includes:	• enabling approved applicants the ability to purchase items (goods and/or services) where the cost of the item exceeds current savings available.

Advantages and disadvantages of credit may include:	• advantages:
	  • obtain and can use purchased item immediately
	  • minimises the need to carry cash or write cheques
	  • allows for instalment payments on expensive items
	  • convenient form of payment when travelling, especially overseas
	• disadvantages:
	  • may increase cost of items purchased due to interest accrued
	  • usually attracts other fees such as account servicing fees
	  • can lead to compulsive buying habits
	  • creates a false sense of wealth.

Consumer ***credit***	• fixed:

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RANGE STATEMENT	
facilities may include:	• personal loans • leases including mobile phones, cars, business premises, office equipment including personal computers • hire purchase • 'buy now, pay later' schemes • revolving: • credit cards • store cards • overdraft.
Differences between unsecured and secured loans include:	• a secured loan is supported by an underlying asset while an unsecured loan is not • unsecured loans attract higher interest rates due to increased risk to the lending institution.
Implications of default on secured loans include:	• any shortfall in sale of repossessed asset against outstanding loan amount must be paid by borrower • repossession of the underlying asset by the lending institution.
Fees and costs associated with different credit options may include:	• account servicing fees • credit purchase fees • late payment fees • loan establishment fees • withdrawing from a foreign Automatic Teller Machine (i.e. the ATM of a lending institution other than your own).
Fees and costs may be ***analysed and compared*** using:	• manually, comparing fees and costs drawn from tables and charts provided by financial institutions and analysed using a calculator • online, web-based, calculation tools • software applications such as spreadsheets.
Ways to compare advertised interest rates may include:	• informing the client of the 'comparison rate' which includes all associated fees and charges.
Strategies to minimise fees on credit may include:	• consolidating savings and credit facilities with the one institution where account servicing fees can be cancelled out • knowing how many free transactions come with the card • paying the minimum monthly instalment on time.
Ways to avoid credit	• not disclosing Personal Identification Number (PIN) to anyone

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RANGE STATEMENT	
card fraud include:	• selecting a PIN only the card holder would know • signing the back of the credit card.
Credit reference reports refers to:	• reports established and maintained by credit reference agencies which record all negative events (i.e. defaults) listed by creditors against debtors.
Implications of establishing a poor credit history may include:	• higher interest rate penalties • inability to obtain finance in the future • may disadvantage applications for rental accommodation • necessity to obtain guarantor in future loans.
Methods of obtaining own credit reference file may include:	• writing, emailing or telephoning the relevant agency requesting a copy of your file, having provided relevant details to identify self.

Unit Sector(s)

Unit sector	Financial literacy

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
2. Identify and apply guidelines, procedures and legislation	2.1 Collect, apply and analyse information on relevant legislation, regulations and codes of practice as applied to financial services industry 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 2.3 Apply relevant codes of practice in an ethical approach to workplace practice and decisions
3. Identify sustainability issues	3.1 Obtain and analyse information on sustainability policies, strategies and impacts on industry from a range of sources 3.2 Identify and promote environmental sustainability as an integral part of business planning and business opportunity 3.3 Incorporate and support triple bottom line principles in work planning
4. Manage information	4.1 Read and discuss with appropriate persons relevant documents and reports that could impact on work effectiveness and compliance 4.2 Analyse, evaluate and check documents, reports, data and numerical calculations to meet customer and organisational requirements 4.3 Present information in format appropriate for audience
5. Participate in and facilitate work team activities	5.1 Provide feedback to team members to encourage, value and reward individual and team efforts, and contributions 5.2 Actively encourage team members to participate in and take responsibility for team activities and communication processes 5.3 Support team to identify and resolve problems which impede its performance 5.4 Ensure own work serves as role model for others and enhances organisation's image and financial services industry
6. Plan work to be completed	6.1 Determine tasks to be done and identify relevant conditions to work autonomously or in team environment 6.2 Plan work to manage resources, time and priorities 6.3 Contribute to organisational planning process as required to achieve service improvement 6.4 Adapt to changes in technology and work organisation in timely manner

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ELEMENT	PERFORMANCE CRITERIA
7. Develop and maintain personal competency	7.1 Identify and review personal professional development needs and goals on regular basis 7.2 Clarify and comply with competency, authorisation and licensing requirements 7.3 Seek professional development opportunities that reflect needs and goals in agreed timeframe

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	• 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	• 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	• Prepares a range of textual information appropriate for audience for informal and formal purposes
Oral Communication	4.1, 4.3, 5.1, 5.2	• 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	• 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	• 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	• Selects and uses appropriate conventions and protocols

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others		when communicating with clients and co-workers in a range of work contexts • 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	• 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

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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

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- 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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	2.1 Obtain agreement on strategies and options to achieve goals and complete processes, and communicate it professionally to relevant parties 2.2 Review strategies and options for compliance with contractual, legislative, regulatory and professional requirements, in accordance with organisational policy and procedures 2.3 Obtain, confirm and correctly document agreement by all parties
3. Identify and document causes of disputes	3.1 Identify and analyse issues or disputes promptly and establish position of relevant parties 3.2 Use professional communication techniques that demonstrate respect and empathy for other viewpoints and positions to establish confidence of relevant parties 3.3 Document disputes and issues promptly and accurately, and verify with all relevant parties
4. Implement and manage strategies to resolve disputes	4.1 Identify, evaluate and implement strategies and options which are most likely to achieve favourable outcomes for all relevant parties 4.2 Implement proceedings promptly to settle dispute in accordance with legislative, regulatory, professional and organisational requirements 4.3 Manage dispute to optimise likelihood of favourable outcome for all parties in line with organisational policy and goals 4.4 Ensure procedures to resolve dispute are in accordance with organisational policy and procedures, and legislative, regulatory and professional requirements 4.5 Document accurate, thorough and accessible records of all aspects of dispute for follow up and future reference 4.6 Contact relevant parties to identify any follow up action required to ensure client satisfaction

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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	• 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	• 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	• 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	• 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	• 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	• 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	• 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

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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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
	audit controls in system specifications 1.4 Identify risks to financial viability and cost contingency strategies to manage risk
2. Design financial management systems	2.1 Access sources of competent assistance and use advice to secure financial records and assets 2.2 Ensure financial management system design provides accurate and timely information about organisation's transactions, working capital and cash flow 2.3 Identify, acquire and implement installation of equipment and software needed for operation of system to support organisation's transactions 2.4 Ensure financial reporting requirements are known and used by relevant personnel 2.5 Ensure established financial reports provide accurate and timely data required for financial decision making 2.6 Produce agreed schedules of account recording and reconciliation systems at regular intervals that support organisation's service provision and business decisions 2.7 Ensure mechanisms for review of terms of trade and fee structures are suited to organisation's needs and meet industry standards 2.8 Prepare financial reports at regular intervals in required format to meet external audit requirements
3. Prepare and review financial plans	3.1 Link financial plans to reviews of organisation's strategic business plan to enable timely financial adjustments 3.2 Maintain probity in planning and implementation of financial management activities 3.3 Ensure financial plans provide reasonable basis for budgeting and ongoing financial management of organisation
4. Monitor and review financial reporting systems	4.1 Use financial reporting systems to evaluate organisational performance against agreed performance indicators, and enable timely adjustments to be made to business investments 4.2 Monitor financial reports and systems to ensure ease of use by staff authorised to manage organisation's finances

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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	• 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	• 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	• 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	• 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	• 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	• 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	• 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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		• Uses digital technologies to manage financial operations and actively investigates new technologies for strategic and operational purposes

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

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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.

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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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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ELEMENT	PERFORMANCE CRITERIA
compliance of the practice with relevant legislation, regulations and codes of practice	proposed procedures and guidelines 2.2 Incorporate compliance issues and procedures into practice guidelines and document appropriately 2.3 Identify and document sources of information and advice on legislative and regulatory requirements 2.4 Establish and document procedures for ensuring currency of information within practice 2.5 Establish and incorporate into practice guidelines, ethical procedures and standards for interpretation of legislation, regulations and codes of practice 2.6 Establish procedures for monitoring compliance with legislation, regulations and codes of practice within practice and for outsourced third party providers
3. Establish risk management procedures for compliance with legislation and regulations	3.1 Establish and document structured and systematic risk management process, which takes into account practice obligations under relevant legislation and regulations 3.2 Identify and document risks of non-compliance 3.3 Establish, document and communicate to staff measures to avoid non-compliance and steps to be taken in event of breaches of obligations 3.4 Ensure measures are consistent with Australian state and federal regulations for licensees and authorised representatives
4. Identify and establish appropriate resources for ensuring the practice can meet its legislative and regulatory requirements	4.1 Identify appropriate levels of financial, technological and human resources to meet practice's legislative and regulatory requirements 4.2 Implement training and assessment procedures to ensure employees have skills needed to comply with legislative and regulatory requirements 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 4.4 Establish and maintain information technology systems and other technological resources to level necessary to enable compliance with legislative and regulatory requirements 4.5 Ensure budgets, requisition procedures and other internal financial systems clearly identify support for legislative and regulatory functions

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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	• 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	• 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	• 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	• 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	• 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	• 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,	• Uses digital technologies to manage business operations and actively investigates new technologies

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	4.1-4.5	for strategic and operational purposes • 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

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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

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- 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

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FNSPRM602 Improve the practice

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 analyse, develop and implement plans to improve the business of a financial practice. It requires the application of diagnosis and benchmarking skills, not for the technical side of the practice but to provide strategies for general business improvement.

It applies to individuals who use specialised knowledge, systematic approaches and analytical skills to provide guidance in strategic organisational activity and continuous improvement.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Diagnose business	1.1 Determine and source data required for diagnosis 1.2 Determine competitive advantage of practice from data and undertake SWOT analysis
2. Benchmark business	2.1 Identify and source relevant benchmarking data 2.2 Select key indicators for benchmarking in consultation with

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ELEMENT	PERFORMANCE CRITERIA
	key stakeholders 2.3 Compare similar indicators of own practice with benchmark indicators and identify areas for improvement
3. Develop plans to improve practice performance	3.1 Develop consolidated list of required improvements and determine cost–benefit ratios for required improvements 3.2 Determine workflow changes resulting from proposed improvements and rank according to agreed criteria 3.3 Develop and agree on action plan to implement top ranked improvements 3.4 Check organisational structures to ensure they are suitable
4. Implement and monitor plan	4.1 Develop implementation plan in consultation with all relevant stakeholders and agree on indicators of success of plan 4.2 Monitor implementation against agreed indicators and adjust 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	Performance Criteria	Description
Reading	1.1, 1.2, 2.1-2.3, 3.4	• Researches and analyses detailed and complex textual information and numerical data from a range of sources to identify specific criteria and determine actions required
Writing	1.2, 2.2, 3.1, 3.2, 3.3, 4.1	• Develops documents using appropriate formats and organises information and data logically and sequentially • 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	2.2, 3.3, 4.1	• Participates in verbal exchanges using active listening and questioning techniques to elicit information and confirm understanding • Provides instructions and presents information structuring tone, pace and content in line with the

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		audience and purpose
Numeracy	2.1, 2.2, 3.1	• Interprets, compares and consolidates numerical and financial information to determine requirements, including the manipulation of data for modelling and benchmarking activities
Navigate the world of work	3.4	• Works autonomously, making high level decisions to achieve and improve organisational goals • Monitors and reviews organisational policy, procedures and adherence to legislative requirements to implement and manage change
Interact with others	2.2, 3.2, 4.1	• Selects, implements and manipulates communications systems, processes and practices to negotiate outcomes • 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
Get the work done	1.1, 1.2, 2.1-2.3, 3.1-3.4, 4.1, 4.2	• 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 • Makes high impact decisions in a complex and diverse environment, using input from a range of sources • Explores and incubates new and innovative ideas through unconstrained analysis and critical thinking to develop and improve organisational goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSPRM602 Improve the practice	FNSPRM602A Improve the 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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSPRM602 Improve the practice

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 and document plans to improve practice performance that:
  - use a wide range of available information sources
  - determine areas of improvement for practice based on analysis of data
- negotiate required improvements to ensure implementation
- monitor improvements against agreed indicators and analyse and adjust, 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:

- analyse the key features of current financial practice systems and structures
- identify the key indicators of business performance for the practice
- compare and contrast methods of interpreting benchmarking and business strategy information
- describe different methods of selecting relevant key benchmarking indicators
- compare and contrast analysis techniques for improving business, including the SWOT technique
- describe how and where to acquire required business and benchmarking data.

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

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- relevant legislation, regulations and codes of practice.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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FNSPRM603 Grow the practice

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 promote and grow a financial practice. It requires the application of marketing skills and the use of market intelligence to develop and implement practice promotion and growth plans.

It applies to experienced individuals who use specialised knowledge and systematic approaches and, within their level of authority, provide guidance in strategic organisational activity.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop marketing plan for practice	1.1 Develop or review practice vision statement objectives 1.2 Identify or refine target markets based on research and experience 1.3 Obtain market research data and develop competitor analysis 1.4 Develop or review practice market position based on research

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ELEMENT	PERFORMANCE CRITERIA
	findings and analysis
2. Develop practice promotion plans	2.1 Develop practice brand and benefits of practice, and identify practice products and services 2.2 Select or develop appropriate promotion tools, as required
3. Develop practice growth plans	3.1 Develop plans to add new clients and increase yield per existing client 3.2 Rank proposed plans according to agreed criteria and develop agreed action plan to implement top ranked plans 3.3 Review practice work activities to ensure they support growth plans
4. Implement and monitor plan	4.1 Develop implementation plan in consultation with all relevant stakeholders 4.2 Agree on indicators of success of plan and monitor implementation against agreed indicators 4.3 Adjust implementation as required to meet objectives

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, 3.3	• Critically analyses documentation from a variety of sources, and records and consolidates information to determine requirements
Writing	1.1, 1.3, 1.4, 2.1, 2.2, 3.1, 3.2, 4.1	• Prepares reports and plans using appropriate formats, and organises information and data logically and sequentially • Uses clear and concise language, correct spelling and grammar and appropriate terminology to convey information appropriate to the audience and purpose
Oral Communication	4.1	• Participates in verbal exchanges using active listening and questioning techniques to elicit information and confirm understanding • Presents information structuring tone, pace and content in line with the audience and purpose

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Numeracy	1.2, 1.3, 1.4, 3.1, 3.2	• Interprets, compares and consolidates numerical and financial information to determine requirements, including the manipulation of data for modelling, ranking and benchmarking
Navigate the world of work	1.1, 1.4, 2.1, 3.1, 4.1, 4.2	• Takes a lead role in the development of organisational goals, roles and responsibilities • Works autonomously, making high level decisions to achieve and improve organisational goals • Monitors and reviews organisational policy, procedures and goals to implement and manage change • Develops and implements strategies that ensure organisational policy, procedures and regulatory requirements are being met
Interact with others	4.1, 4.2	• Develops and implements communications strategies with internal and external persons to build rapport and negotiate agreeable outcomes • Influences and fosters a collaborative culture, facilitating a sense of commitment and workplace cohesion
Get the work done	1.1-1.4, 2.1, 2.2, 3.1-3.3, 4.2, 4.3	• Plans strategic priorities and outcomes within a flexible, efficient and effective context in a diverse environment • Uses digital tools to access, gather and analyse data • Addresses complex problems involving multiple variables, using formal analytical and lateral thinking techniques, experience and knowledge to generate solutions • Explores and incubates new and innovative ideas through unconstrained analysis and critical thinking to develop and improve organisational goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSPRM603 Grow the practice	FNSPRM603A Grow the practice	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for FNSPRM603 Grow the practice

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 and document a marketing and/or business development plan for the practice that:
  - identifies key market data for the practice
  - reviews the market position and identifies improvements based on analysis of data and research findings
  - addresses promotional activities and branding for the practice to build clients
  - includes an implementation or action plan to achieve identified improvements
- implement, monitor and make adjustments to the plan to meet objectives.

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:

- analyse the key features of financial industry products and marketing mix
- describe how and where to source relevant financial organisation data
- describe the key metrics to measure successful growth of the business
- describe the key features of relevant marketing principles for professional practices
- compare and contrast business research techniques, including competitor analysis
- outline key features and purposes of business development, marketing or promotional and implementation plans
- describe promotional tools that can be used to build clients and business.

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:

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- common 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

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FNSSAM301 Identify opportunities for cross-selling products and services

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 cross-selling opportunities and sell the identified products or services to customers while providing other services.

It applies to individuals who, within their level of authority, apply specialised knowledge to make judgements and recommendations based on specific information.

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

Unit Sector

Sales and marketing

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. Identify opportunities for cross-selling of products and services	1.1 Use range of communication and interpersonal skills to respond to enquiry, identify customer needs and establish relationship with customer 1.2 Identify further opportunities for providing customer with additional products or services based on understanding of customer needs, and access further information about identified products and services if required
2. Promote sales of	2.1 Explain benefits and features of additional products or services

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ELEMENT	PERFORMANCE CRITERIA
products and services	to customer clearly and accurately 2.2 Match organisation's products or services to assessed customer needs and offer number of options 2.3 Check compliance with relevant legislation, regulations and industry codes of practice for all options developed
3. Refer sales or service to appropriate area	3.1 Prepare documentation for processing when decision has been reached on sale of product or service to be provided 3.2 Inform customer of reasons why referral to other personnel is required if this needs to occur

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, 2.2, 2.3	• Analyses a range of textual information from a variety of sources to identify key details, make judgements and determine requirements
Writing	1.1, 1.2, 2.1, 3.1, 3.2	• Develops material to a specific audience using clear and detailed language to convey accurate information • Records outcomes of communications using specific language, grammar and punctuation to correctly and effectively convey recommendations
Oral Communication	1.1, 1.2, 2.1, 3.2	• Participates confidently in verbal exchanges and provides technically correct information using vocabulary, tone and pace appropriate to the audience and the situation • Uses active listening and questioning techniques to elicit the views and opinions of others and confirm understanding
Numeracy	1.2, 2.1	• Uses a limited range of mathematical calculations to perform comparisons of financial information
Navigate the world of work	2.3	• Applies knowledge of legal rights and responsibilities on own work context
Interact with others	1.1, 1.2, 2.1, 2.2, 3.2	• Identifies ways of establishing connections and building relationships with a diverse range of people

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		• 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, 1.2, 2.1, 2.2, 2.3, 3.1	• Takes responsibility for planning and sequencing tasks to achieve required outcomes • Systematically gathers and analyses all relevant information and evaluates options to address issues or make product or service recommendations • Uses digital systems and tools to connect with others and to access, filter, extract, organise and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSSAM301 Identify opportunities for cross-selling products and services	FNSSAM301A Identify opportunities for cross-selling products 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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSSAM301 Identify opportunities for cross-selling products and services

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:

- interact with customers and identify cross-selling opportunities
- clearly explain additional products and services that may be beneficial to customers and provide options based on customer needs in line with relevant legislation, regulations and industry codes of practice
- refer customers to other appropriate sections of the organisation, as required
- complete relevant documentation following organisational procedures.

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 customer relations building techniques
- outline the key features of financial products and services offered by or through an organisation
- explain the key features of finance industry and organisational policy and procedures
- explain the organisational process and procedures for cross-selling services and products
- describe the key features of a range of products including:
  - interest rates
  - terms
  - special packages
- explain the key requirements of relevant legislation and the potential and/or actual impact on information requested or provided
- compare and contrast selling techniques.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sales and marketing field of work and include access to:

- financial services product information
- a relevant software system and data
- organisational policy and procedures
- 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

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FNSSAM402 Implement a sales plan

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 review a sales and promotional strategy for a financial services organisation.

Individuals work under a level of supervision but have responsibility for collating, coordinating and reviewing strategic activities.

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

Sales and marketing

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. Implement promotional strategy	1.1 Analyse sales plan to clarify strategy and sales targets 1.2 Create promotional package to meet requirements of sales plan, enhance business corporate image and satisfy all relevant legislation, regulations and codes of practice 1.3 Implement promotional strategy within budget and in timeframes specified
2. Prepare distribution	2.1 Identify distribution channels and reach agreements for selling

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ELEMENT	PERFORMANCE CRITERIA
channels	products and/or services 2.2 Train personnel to develop product and service knowledge and ensure quality client service is maximised 2.3 Distribute promotional materials to salespeople through established distribution channels within appropriate timeframes
3. Monitor and review sales plan implementation	3.1 Establish criteria to measure effectiveness of promotional strategy and performance criteria for sales staff and distribution channels, and monitor attainment of forecast sales target 3.2 Make adjustments to promotional strategy or product and service distribution, as necessary, to ensure required result is being obtained 3.3 Contribute feedback on implementation of sales plan and promotional strategy to sales planning 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, 2.1	• Analyses a range of textual information from a variety of sources and collates and distributes according to specific requirements
Writing	1.2, 2.1-2.3, 3.1-3.3	• Prepares a range of materials suited to specific purposes and audiences using appropriate format, clear language and accurate spelling and grammar
Oral Communication	2.1, 2.2, 2.3, 3.1-3.3	• Participates in verbal exchanges and clearly explains detailed information using language, tone and pace appropriate to the audience • Uses active listening and questioning techniques to clarify and convey information and to obtain feedback
Numeracy	1.3, 2.3, 3.1	• Uses mathematical equations to calculate, compare and collate numerical and financial data required for planning and scheduling activities
Navigate the world of work	1.2, 1.3	• Monitors adherence to legal and regulatory rights and responsibilities when undertaking own tasks • Recognises and follows explicit and implicit protocols, and meets organisational expectations

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Interact with others	2.1-2.3, 3.1, 3.3	• Selects the appropriate form, channel and mode of communication to achieve a specific purpose • Tailors every communication to achieve its purpose, demonstrating a sophisticated understanding of the needs, interests, issues and priorities of each audience • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction through the sharing of knowledge, information and resources and by providing feedback
Get the work done	1.1-1.3, 2.1-2.3, 3.1, 3.2	• Uses existing structures and systems when developing plans for complex activities, monitors achievement against goals, budgets and timeframes, and makes adjustments if required • Plans, organises and implements activities for staff and others to ensure organisational training goals are met • Identifies the critical factors that impact on decisions, evaluates the effectiveness of decisions, monitors outcomes and reflects on the impact for future situations • Applies lateral thinking techniques as part of the creative process • Uses digital systems and tools to access information, identify trends and manipulate data to assist in the development of strategies

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSSAM402 Implement a sales plan	FNSSAM402A Implement a sales plan	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

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Assessment Requirements for FNSSAM402 Implement a sales plan

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:

- analyse a sales plan to develop suitable promotional and budgetary programs
- implement a sales strategy, including putting appropriate sales training in place and preparing promotional materials
- evaluate and make necessary adjustments to ensure the success of a sales 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:

- analyse marketing techniques and market trends
- describe the range of products and services provided by the organisation
- explain the key requirements of legislation, regulation and codes of practice relating to selling financial products and services
- compare and contrast sales and promotion techniques
- outline types of promotional packages and distribution channels used to promote financial products and services
- describe the key features of training strategies used in sales and marketing
- describe the performance criteria used to measure the success of sales plan implementation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sales and marketing field of work and include access to:

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- financial services product information
- relevant software system and data
- organisational policy and procedures
- 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

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HLTAID003 Provide first aid

Modification History

Release	Comments
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	This version was released in *HLT Health Training Package release 1.0* 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. Removal of prerequisite unit

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.*

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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

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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 described those required skills (such as 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

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Assessment Requirements for HLTAID003 Provide first aid

Modification History

Release	Comments
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	This version was released in *HLT Health Training Package release 1.0* 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. Removal of prerequisite unit

Performance Evidence

e 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

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    - 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

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  - 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

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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 NVR/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

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HLTAID005 Provide first aid in remote situations

Modification History

Release	Comments
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 *HLT Health Training Package release 1.0* 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.

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**

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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 condition, management and responses
	3.4 Assist in the evacuation of the casualty by following directions given by emergency response services as

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes.	*Performance criteria specify the level of performance needed to demonstrate achievement of the element.*
	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 described those required skills (such as 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

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Assessment Requirements for HLTAID005 Provide first aid in remote situations

Modification History

Release	Comments
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 *HLT Health Training Package release 1.0* 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

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    - 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

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  - 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

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  - 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

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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 NVR/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

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ICTICT103 Use, communicate and search securely on the internet

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 connect to the internet, securely send and receive emails, search the internet using web browsers and interact securely and in a socially responsible manner with a range of different internet sites.

It applies to individuals who use business technology to perform a range of routine tasks in the workplace or home office with limited responsibility.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Connect to and access the internet	1.1 Connect to internet via existing internet connection and confirm functionality 1.2 Open internet browser and set home page of personal choice by setting internet options 1.3 Ensure internet browser software security 1.4 Adjust display of the internet browser to suit personal requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Modify toolbar to meet user and internet browser needs 1.6 Access a particular website, note privacy and other conditions of use, and retrieve data 1.7 Use socially responsible behaviour when sharing information on the internet 1.8 Enter uniform resource locator (URL) in address line of internet browser
2. Use email for communications	2.1 Open email application package, create new email message and add addressees 2.2 Compose text of an email message according to organisational guidelines, and spell check and edit text as required 2.3 Create and add an automatic signature for the user 2.4 Attach files to email message where required 2.5 Determine and set priority and send email message 2.6 Reply to and forward a received message using available features 2.7 Open and save an attachment to the relevant folder 2.8 Search for, sort and save email message using available settings 2.9 Adjust email accounts to restrict and quarantine possible email security problems 2.10 Print email message as required
3. Search the internet	3.1 Review organisational guidelines on internet access 3.2 Open internet application and locate and access a search engine on the internet, and define search expressions based on data required 3.3 Enter appropriate key words into the search engine to locate desired information 3.4 Refine a search depending on outcomes of original search 3.5 Save search expression results and present them in a report according to information requirements 3.6 Create a bookmark within the internet browser or a link for the required web page for the key results 3.7 Save key results in a bookmark folder 3.8 Modify internet browser options for printing and print a

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ELEMENT	PERFORMANCE CRITERIA
	web page 3.9 Close internet browser
4. Access and use consumer specific sites on the internet	4.1 Identify, access and review information specific sites to gain consumer information 4.2 Identify and use internet application sites to lodge details and gain access and information 4.3 Access and use online forms on the internet
5. Undertake online transactions	5.1 Access online transaction site 5.2 Ensure security of transaction site 5.3 Enter required information into fields on merchant's website 5.4 Ensure pop-up dialog boxes, prompts or feedback mechanisms are completed 5.5 Enter, check and make changes to preferred transaction options 5.6 Complete online transaction 5.7 Record and archive receipts according to business processes 5.8 Close down and leave transaction process
6. Conduct an advanced search	6.1 Use search tools and advanced search features 6.2 Use Boolean search techniques when required to enhance the search 6.3 Use multiple or meta-search tools with a range of key words 6.4 Use search engines particular to a field of knowledge to refine the outcome 6.5 Access related virtual community sites and newsgroups, and note their objectives and operational arrangements 6.6 Conduct a search with domain names to refine the search
7. Use information that has been located	7.1 Cross reference information found by using several websites to determine accuracy of information 7.2 Check date that website was last updated or properties of website to determine currency of information 7.3 Determine website authority by looking at copyright statements, privacy statements and organisational information 7.4 Save and print information found in different file forms

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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, 1.6, 2.1, 2.6-2.8, 3.1, 3.2, 4.1-4.3, 5.1, 5.2, 5.4, 5.5, 6.5, 7.1-7.3	• Interprets textual information and instructions to efficiently undertake the task
Writing	2.1-2.3, 3.5, 5.3, 5.4, 5.7	• Uses required format to accurately enter information specific to requirements • Composes short and specific messages using format, grammar and language appropriate to audience
Navigate the world of work	1.7	• Understands main responsibilities and boundaries of own role
Get the work done	1.1-1.8, 2.1, 2.3-2.10, 3.2-3.9, 4.1-4.3, 5.1-5.8, 6.1-6.6, 7.4	• Plans routine tasks with familiar goals and outcomes, taking limited responsibility for decisions regarding sequencing • Understands the purpose and specific functions of common digital tools used in work contexts • Recognises and responds to common operational problems when using web browsers • Takes responsibility for routine low-impact decisions within familiar situations • Implements basic security requirements related to own tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICTICT103 Use, communicate and search securely on the internet	ICAICT103A Use, communicate and search securely on the internet	Updated to meet Standards for Training Packages	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTICT103 Use, communicate and search securely on the internet

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:

- connect to and access the internet
- send and receive emails
- secure internet access and email communications
- use search tools to locate information
- use different internet search techniques
- research and select appropriate website
- undertake online transactions
- assess the accuracy, currency, authority and reliability of the site and information located.

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 :

- list basic technical terminology related to reading help files and prompts
- describe the basics of copyright and privacy statements
- explain different types of messages that occur, including error messages and messages to install plug-ins
- list different types of search engines and web browsers
- list procedures for using email applications
- list procedures for evaluating and assessing the authority, reliability and authenticity of information
- outline internet search functions
- describe internet speed and traffic loads related to times of accessing the internet
- describe the makeup and structure of internet addresses

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- list organisational guidelines on internet and email use (web etiquette or netiquette)
- describe business process related to online transactions
- describe web browser update techniques
- explain what key words and bookmarks are used for.

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 information and communications technology (ICT) industry, and include access to:

- a personal computer or digital device with internet
- search engines currently used in industry
- organisational policies on internet usage.

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

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ICTICT203 Operate application software packages

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 identify, select and operate three commercial software packages, including a word-processing and a spreadsheet application package.

It applies to individuals who utilise different software applications within a small to large office environment to produce diverse documents.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Use appropriate workplace health and safety (WHS) office work practices	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are addressed 1.2 Use wrist rests and document holders where appropriate 1.3 Use monitor anti-glare and radiation reduction screens where appropriate
2. Use appropriate	2.1 Select word-processing software appropriate to perform

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ELEMENT	PERFORMANCE CRITERIA
word-processing software	activity 2.2 Identify document purpose, audience and presentation requirements, and clarify with personnel as required 2.3 Identify organisational requirements for text-based business documents, and design document structure and layout to ensure consistency of style and image 2.4 Match document requirements with software functions to provide efficient production of documents 2.5 Use technical functions, other data and formatting to finalise documents 2.6 Ensure the naming and storing of documents in appropriate directories or folders and the printing of documents to the required specifications
3. Use appropriate spreadsheet software	3.1 Select spreadsheet software appropriate to perform activity 3.2 Identify document purpose, audience and presentation requirements, and clarify with personnel as required 3.3 Enter simple formulas and functions using cell referencing where required 3.4 Customise spreadsheet settings to meet requirements 3.5 Ensure the naming and storing of documents in appropriate directories or folders and the printing of documents to the required specifications
4. Use a third application software package	4.1 Select software application package appropriate to perform activity 4.2 Identify purpose, audience and presentation requirements, and clarify with personnel as required 4.3 Use technical functions, other data and formatting to finalise documents 4.4 Ensure documents are named and stored in appropriate directories or folders and printed to required specifications

Foundation Skills

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

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Skill	Performance Criteria	Description
Reading	2.2-2.5, 3.2-3.4, 4.2, 4.3	• Recognises and interprets textual information to determine organisational standards and job requirements • Interprets and comprehends symbols, icons and text associated with applications software
Writing	2.3-2.6, 3.3- 3.5, 4.3, 4.4	• Enters both written and verbally received information and data into a format suitable for the software application • Selects vocabulary, syntax, terminology, labelling and naming conventions suitable for the program
Oral Communication	2.2, 2.3, 3.2, 4.2	• Uses simple, relevant language, effective questioning, and active listening techniques to clarify work requirements
Numeracy	3.2-3.4	• Adds, subtracts, multiplies and divides whole numbers and decimals, identifying and selecting the correct formulas and functions to use • Applies the order of operations in calculations
Navigate the world of work	1.1	• Takes some personal responsibility for adherence to legal and regulatory requirements
Get the work done	1.2, 1.3, 2.1-2.6, 3.1-3.5, 4.1-4.4	• Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role • Understands purposes, specific functions and key features of common digital systems and tools, and operates them effectively to complete routine tasks, adapting some functions to improve personal efficiency • Plans routine tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding sequencing

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICTICT203 Operate application software packages	ICAICT203A Operate application software packages	Updated to meet Standards for Training Packages	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTICT203 Operate application software packages

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:

- produce workplace documents using a minimum of three different software application packages
- open, amend and save files and documents according to organisational requirements
- apply workplace health and safety (WHS) principles and responsibilities for ergonomics, such as work periods and breaks
- use help manuals and online help.

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 application software packages used by the organisation and list the purpose of each
- explain basic technical terminology related to reading help files and responding to system help prompts
- outline current business practices related to using software to prepare reports
- list features and functions of commercial computing packages
- describe import and export software functions
- describe the process of linking documents
- outline WHS principles and responsibilities for ergonomics, such as work periods and breaks
- explain the purpose of input and output devices.

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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 information and communications technology (ICT) industry, and include access to:

- a personal computer (PC) and printer
- software currently used in industry
- documents detailing organisational style guide and policy
- documents or information containing data suitable for developing software application 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=a53af4e4-b400-484e-b778-71c9e9d6aff2

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ICTICT209 Interact with ICT 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 routine information and communications technology (ICT) support to clients in a professional manner.

It applies to individuals who, while working under a level of supervision, have responsibility in a frontline technical support capacity to exercise discretion and judgement using appropriate knowledge to provide assistance.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Deliver support to ICT clients	1.1 Provide support for ICT clients in a courteous and professional manner according to organisational policy 1.2 Establish and confirm nature of client's ICT concerns using active listening and questioning 1.3 Maintain client contact and provide progress information until the problem is resolved
2. Respond to ICT client	2.1 Respond to ICT client's concerns and issues, demonstrating

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ELEMENT	PERFORMANCE CRITERIA
complaints	a positive, sensitive and helpful attitude 2.2 Escalate and refer client concerns to support person if required, explaining the nature of issues involved 2.3 Resolve ICT client complaint using recommendations from the support person 2.4 Document and record ICT client concerns and solutions, according to organisational guidelines
3. Evaluate received ICT client complaints	3.1 Analyse recent ICT register 3.2 Propose proactive training to appropriate person

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	• Evaluates textual information containing ICT specific terminology to establish proactive training needs
Writing	2.4	• Completes documentation necessary for work tasks and reporting requirements by using clear, concise and accurate grammar and language, and relevant ICT terminology
Oral Communication	1.1-1.3,2.1-2.3, 3.2	• Uses effective questioning and active listening techniques to elicit information and clarify client queries, concerns and complaints • Contributes to an effective working environment by communicating in a courteous manner and using clear, easy-to-understand and non-discriminatory language and behaviour
Navigate the world of work	1.1	• Generally follows the explicit protocols immediately related to own role
Get the work done	1.3, 2.3, 3.1	• Recognises and responds to predictable routine problems related to role in the immediate work context • Uses the main features and functions of common digital tools in everyday work contexts

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalent status
ICTICT209 Interact with ICT clients	ICAICT209A Interact with ICT clients	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

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Assessment Requirements for ICTICT209 Interact with ICT 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:

- provide routine information and communications technology (ICT) client support in a professional manner
- refer client concerns to support person if required, according to escalation procedures
- resolve client complaints
- document and record client concerns and solutions according to organisational guidelines.

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:

- list current industry accepted hardware and software products, and describe their general features and capabilities
- describe the ICT client business domain and business critical functions
- discuss the organisational systems and working environment
- outline organisational policies for external and internal client contact.

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 personal computer
- relevant organisational guidelines
- relevant documentation

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- a site where routine ICT client support may be demonstrated.

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

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ICTICT511 Match ICT needs with the strategic direction of the enterprise

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 ensure information and communications technology (ICT) services meet current and future internal operational enterprise requirements.

It applies to individuals whose responsibilities may include maintaining and supporting critical infrastructure for objectives in small-to-medium sized 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Evaluate current business strategy	1.1 Analyse current strategic plan of the organisation to understand the industry environment and current organisational goals 1.2 Compare information related to current operational practices and the strategic plan to determine possible ICT gaps and improvement opportunities 1.3 Report information regarding the effect of ICT

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ELEMENT	PERFORMANCE CRITERIA
	developments to an appropriate person
2. Evaluate effect of changes	2.1 Review information on current ICT systems supported by the organisation 2.2 Compare and document advantages and disadvantages of current and proposed ICT systems 2.3 Determine the objectives and implications of introducing changes 2.4 Document findings and forward to appropriate person for feedback
3. Develop action plans	3.1 Develop plans to implement proposed changes according to organisational policy and procedures 3.2 Document action plans, ensuring that standards, targets and implementation methods are detailed 3.3 Forward documentation to appropriate person for feedback and approval

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, 2.2	• 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	1.3, 2.2, 2.4, 3.1, 3.2	• Uses plain English, together with vocabulary, grammatical structures, terminology, diagrams, numerical information, formatting and structure relevant to the job role and organisation
Oral Communication	1.3, 2.3, 3.1	• 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

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Numeracy	1.1, 1.2, 2.2, 2.3, 3.1	• Interprets numerical data and applies mathematical calculations to assess the financial implications of introducing changes
Navigate the world of work	1.1, 3.1	• Takes full 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
Interact with others	1.3, 2.4, 3.3	• Selects, implements and seeks to improve protocols governing communications to clients and co-workers in a range of work contexts • Collaborates with others sharing information to build strong work groups and avoid behaviours that are not conducive to a productive environment
Get the work done	1.1-1.3, 2.2, 2.3, 3.1	• 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**
ICTICT511 Match ICT needs with the strategic direction of the enterprise	ICAICT511A Match IT needs with the strategic direction of the enterprise	Updated to meet Standards for Training Packages. Minor edits to title and to clarify intent of performance criteria	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTICT511 Match ICT needs with the strategic direction of the enterprise

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:

- access and analyse relevant information on changes to technology and resources
- analyse strategic plans to determine future technology needs
- monitor resource use and cost-efficiency and effectiveness of technology
- develop and document action plan detailing standards, targets, timelines and implementation methods.

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 methods of analysis and planning approaches to technical problems and management requirements
- assess and document the hardware platform used by the organisation and network, and the subsequent security guidelines required
- explain current system functionality to forecast for planning
- identify and specify operating systems supported by the organisation to forecast for planning
- compare competing and complementary internal and external operating environments
- identify and assess technology and product directions for evaluating and forecasting vendor and technology trends.

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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 information and communications technology (ICT) industry, and include access to:

- a site where ICT needs and strategic directions of the enterprise may be coordinated
- detailed information relating to abusiness strategic plan
- information on a range of ICT business solutions.

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

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ICTICT515 Verify client business requirements

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 deal with clients at a senior level, to identify their business requirements and verify the accuracy of the information gathered.

It applies to individuals who are 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish business relationship	1.1 Identify organisational structure, culture and politics in relation to support requirements 1.2 Identify organisational stakeholders 1.3 Develop business relationship with client across the appropriate number of organisational units 1.4 Schedule regular liaison to manage relationship
2. Determine context of	2.1 Work with client to define the business problem to be

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ELEMENT	PERFORMANCE CRITERIA
business need or problem	investigated 2.2 Establish system boundaries and scope 2.3 Manage preparation of appropriate information gathering 2.4 Ensure that project objectives and outcomes are documented 2.5 Work with client to substantiate documentation
3. Analyse new information	3.1 Supervise information gathering from identified clients of the system 3.2 Analyse gathered client responses 3.3 Analyse new system requirements 3.4 Ensure that new system requirements and problems are documented
4. Confirm system specifications	4.1 Review documentation 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 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, 2.5, 3.2, 3.3, 4.1	• 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	1.4, 2.3-2.5, 3.4, 4.2	• Uses plain English and appropriate questioning strategies, avoiding loaded or leading questions, when developing information gathering documentation • Uses plain English, appropriate grammatical structures and terminology, diagrams and flow charts, numerical information, and formatting and document

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		structure relevant to the job role and organisation to record new system requirements and associated risks
Oral Communication	1.1-1.3, 2.1, 2.2, 2.5, 3.1, 4.2, 4.3	• Elicits the view and opinions of others and obtains information by listening and questioning • Participates in a verbal exchange of ideas/solutions and uses detailed and clear language to clarify and present information according to requirements and audience • Articulates requirements and strategies clearly, using appropriate tone, style, body language and reflective responses to build business relationships
Numeracy	2.2-2.5, 3.3, 4.2	• Interprets numerical information and applies mathematical calculations relating to time durations and budgetary information
Interact with others	1.3, 4.3	• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Get the work done	1.1, 1.2, 1.4, 2.2, 2.3, 3.2, 3.3	• Uses a combination of formal and logical planning processes and an increasingly intuitive understanding of context to evaluate appropriate solutions • Takes responsibility for high-impact decisions in complex situations involving many variables and constraints • Considers the strategic and operational potential of digital trends to achieve work goals, enhance work processes, create opportunities and reduce risks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTICT515 Verify client business requirements	ICAICT515A Verify client business requirements	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

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Assessment Requirements for ICTICT515 Verify client business requirements

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:

- establish business relationship through investigation of the organisation and interviews with client and staff
- determine and document business expectations and needs, including critical business requirements
- work with clients and staff to gather, analyse and confirm information contributions
- review and gain approval for system specifications.

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 process of communicating with the client in order to gather and report data
- provide an overview of the client business to enable informed information and communications technology (ICT) product selection
- describe the process used to identify products related to the business
- outline the role of stakeholders and the degree of stakeholder involvement.

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:

- current business needs
- client expectations brief
- business objectives

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- systems, data gathering and appropriate software products.

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

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ICTICT602 Develop contracts and manage contracted performance

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 negotiate and document contractual arrangements between clients and vendors, and to monitor and manage performance against agreed contractual obligations.

It applies to individuals who work 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish contract	1.1 Determine boundaries of the contract 1.2 Document contract details and provide a copy to the client and vendor for review 1.3 Obtain client and vendor feedback to clarify problems and misunderstandings 1.4 Facilitate negotiations to resolve problems and

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ELEMENT	PERFORMANCE CRITERIA
	misunderstandings 1.5 Seek agreement from stakeholders
2. Monitor contract	2.1 Monitor performance against contractual obligations to ensure desired level of quality is maintained 2.2 Ascertain client satisfaction with contractual performance 2.3 Identify and take action to address unsatisfactory performance 2.4 Provide recommendations for contractual variations, if required 2.5 Forward recommendations to appropriate person for approval

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, 2.3	• Identifies and analyses a variety of organisational documentation, vendor and client information, technical specifications and financial data
Writing	1.2, 2.4	• Integrates information and requirements from a number of sources using correct spelling and grammar, specialised and cohesive language, and formal contract documentation structures
Oral Communication	1.1, 1.3-1.5, 2.1-2.5	• Uses effective listening and probing, and open questioning techniques to elicit the views and opinions of others and obtain information and feedback • Articulates requirements clearly in plain English and uses appropriate tone, style, body language and reflective responses to interact effectively, remedy issues and disagreements, and negotiate outcomes
Numeracy	1.1-1.3, 2.1, 2.3, 2.4	• Uses a range of mathematical and financial calculations to determine and monitor contractual milestones, costs and budgetary constraints
Interact with others	1.2, 2.5	• Actively identifies the requirements of important communication exchanges, selecting appropriate

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		channels, format, tone and content to suit purpose and audience
Get the work done	1.1, 1.4, 2.1, 2.3	• 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 and evaluating options against agreed criteria • Uses nuanced understanding of context to recognise anomalies and subtle deviations to normal expectations, focussing attention on critical issues and variables and filtering out peripheral issues • Considers the strategic and operational potential of digital trends to achieve work goals, enhance work processes, create opportunities and reduce risks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTICT602 Develop contracts and manage contracted performance	ICAICT602A Develop contracts and manage contracted performance	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

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Assessment Requirements for ICTICT602 Develop contracts and manage contracted performance

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:

- negotiate and formulate contracts
- access and analyse relevant information on resources and budgets
- analyse current and future contract requirements
- monitor resource use, cost efficiency and effectiveness against contractual obligations
- review objectives and performance measures.

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 analysis and planning approaches to technical problems or management requirements, taking into account:
  - organisational values
  - purpose in the context of formulating contracts
- outline methods for evaluating and forecasting vendor and technology trends
- discuss contracting requirements related to information and communications technology (ICT)
- describe methods of purchasing ICT equipment and services, such as negotiating extensive client support contracts
- outline industry standards in relation to service and product agreements.

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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:

- detailed information relating to business strategic plan
- budget constraints
- timeframe for the strategic plan
- business objectives
- information on a range of ICT business solutions
- outcomes of a business analysis process.

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

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ICTICT606 Develop communities of practice

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 identify areas that would benefit from communities of practice (CoPs), and to develop such communities.

It applies to individuals who work in senior information and communications technology (ICT) management roles and are responsible for teams and their production.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify requirement for community of practice	1.1 Map organisational knowledge 1.2 Identify existing informal communities of practice (CoPs) 1.3 Identify situations where staff will benefit from closer cooperation across organisational boundaries 1.4 Identify those in disparate areas that share work goals
2. Devise spaces for involvement	2.1 Enable electronic meeting spaces 2.2 Enable shared storage areas, both public and private

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Enable group mailing capability 2.4 Enable other appropriate technical facilitators
3. Invite participation	3.1 Publicise collaborative tools 3.2 Invite staff in areas identified above to group events, such as training and conferences 3.3 Allow new groups to coalesce spontaneously 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, including the disbanding of a CoP where its purpose has been achieved

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	• 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	1.1, 3.1, 3.2, 4.1, 4.2	• 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
Oral Communication	1.1-1.4, 3.1, 3.2, 4.1, 4.2	• Elicits the view and opinions of others and obtains information by using effective listening and probing open questioning techniques • Uses the appropriate pitch and tone of voice, encouraging body language, reflective responses, plain English and a courteous manner when encouraging participation and facilitating CoPs
Interact with others	3.2-3.4, 4.1	• 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

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Get the work done	1.1-1.4, 2.1-2.4, 4.2	• Takes responsibility for defining key aspects of own workload, balancing own needs and priorities with those of the work group • Actively identifies, creates and utilises linkages to enhance knowledge sharing, idea creation, individual and collective engagement and work outcomes • Actively identifies systems, devices and applications with potential to meet current and future needs

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTICT606 Develop communities of practice	ICAICT606A Develop communities of 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=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTICT606 Develop communities of practice

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 and map appropriate areas for communities of practice (CoPs) for an organisation
- identify and manage the provision of enabling methodologies
- foster and encourage participation in CoP
- facilitate the development of CoP.

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:

- define ‘communities of practice’ and describe their purpose in an organisation
- outline organisational structures, goals and knowledge, and how they apply to CoPs
- identify and compare communications enabling technologies
- discuss group dynamics and its impact on building CoPs
- describe techniques to promote, market and engage with CoPs and the enabling technologies.

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 information and communications technology (ICT) industry, and include access to:

- an organisational structure, goals and knowledge
- a site where CoP may be developed.

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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

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ICTSAS204 Record client support requirements

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 record, prioritise and escalate client support requests.

It applies to frontline technical support individuals who provide information and communications technology (ICT) client support in a small or large office 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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Log requests for support	1.1 Record client support requests and requirements according to organisational standards 1.2 Review client support history and details 1.3 Check the information and request for accuracy and urgency according to organisational standards
2. Prioritise support requests with appropriate	2.1 Identify guidelines for prioritising or rating client requests 2.2 Prioritise client request based on its criticality or effect on

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ELEMENT	PERFORMANCE CRITERIA
personnel	business
3. Record support request	3.1 Document support request according to organisational requirements 3.2 Refer requests to appropriate person or department for assistance

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	• Interprets familiar textual information from a range of sources to identify and review practices and determine that appropriate standards have been maintained
Writing	1.1, 3.1, 3.2	• Develops materials and resources using simple vocabulary to accurately convey and record client information according to requirements and standards
Navigate the world of work	1.1-1.3, 2.1-2.2, 3.1-3.2	• Understands roles and responsibilities for task and makes basic decisions on work completion parameters in accordance with organisational standards
Interact with others	3.2	• Identifies and takes steps to follow accepted communication practices and protocols
Get the work done	1.1-1.3, 2.1-2.2, 3.1-3.2	• Plans and implements routine tasks, aiming to achieve them efficiently • Makes low-impact decisions within familiar situations, based on a range of predefined or routine solutions, and evaluates the effectiveness of the outcome • Understands the purposes, specific functions and key features of common digital systems and tools, and operates them effectively to complete routine tasks

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICTSAS204 Record client support requirements	ICASAS204A Record client support requirements	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

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Assessment Requirements for ICTSAS204 Record client support requirements

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:

- log and record calls according to organisational policy and procedures
- prioritise and escalate client support requests according to organisational policy and procedures.

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 a range of software and hardware diagnostic tools
- describe organisational procedures for escalating issues
- describe maintenance procedures
- identify business scheduling requirements
- describe current business practices to prepare reports
- identify organisational procedures to rate and prioritise client requests
- identify roles and responsibilities of the information and communications technology (ICT) division.

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:

- sites where logging and client support may be recorded and prioritised
- client support history records

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- organisational policy and procedures related to:
  - critical process
  - escalation procedures
  - logging procedures
  - prioritising client requests.

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

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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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
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

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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	• 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,	• Uses written vocabulary, grammatical structures and conventions to accurately convey instructions and

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	2.9, 3.1-3.4	record complex information
Oral Communication	1.2, 1.4, 1.5, 2.1, 2.4-2.8	• 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	• 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	• 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

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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

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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.

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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

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ICTWEB201 Use social media tools for collaboration and engagement

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 establish a social networking presence, using social media tools and applications. It includes the requirement to review, compare, and use different types of social networking tools and applications.

It applies to information and communications technology (ICT) personnel who need to develop a social networking web presence for a small or large office environment, using social media tools and applications.

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
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Describe the different types of social media tools and applications	1.1 Explain the characteristics of the term ‘social media’ 1.2 Identify different types of social-media tools and applications 1.3 Illustrate some of the issues associated with the use of social media tools and applications

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ELEMENT	PERFORMANCE CRITERIA
2. Compare different types of social media tools and applications	2.1 Select one social media type to review 2.2 Review the most popular tools, and applications, within that social media type 2.3 Itemise the benefits across a range of the most popular tools and applications 2.4 Select the most appropriate social media tool or application
3. Set up and use, popular social media tools and applications	3.1 Identify the social media tools and applications available for possible implementation 3.2 Initiate the preferred social media tools, and applications, for use 3.3 Establish the social media interface, using text and file content 3.4 Initiate social networking interaction 3.5 Test and evaluate tools, and applications, for ease of use 3.6 Present the findings

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	• Extract the relevant information from technical and organisational documents
Writing	1.1, 2.2, 2.3, 3.3, 3.4, 3.6	• Develop the content in a manner that supports and conveys information, using the appropriate structures and specialised language
Navigate the world of work	1.3	• Understands legal and ethical responsibilities, regarding the use of social media tools
Get the work done	2.1, 2.2, 2.4, 3.1, 3.2, 3.5, 3.6	• Makes routine decisions and implements standard procedures for routine tasks • Understands the purposes, specific functions, and the key features of common digital systems and tools, and operates them effectively to complete routine tasks

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Unit Mapping Information

Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
ICTWEB201 Use social media tools for collaboration and engagement	ICAWEB201A Use social media tools for collaboration and engagement	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

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Assessment Requirements for ICTWEB201 Use social media tools for collaboration and engagement

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 different types of social media tools and applications, and the issues associated with their use
- access the internet, set up a social networking presence and upload and link a wide variety of files
- use and evaluate social media tools and applications.

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:

- list basic technical terminology in relation to social networking, social media applications, and tools
- outline basic methods of uploading images, text files, portable document format (PDF) files, audio files, video files, and link the associated files
- state the features, and functions, of social media applications
- list import and export software functions
- explain how to link documents
- explain the process of tagging, in order to facilitate collaborative folksonomy
- list social media applications and procedures, for connecting to social networking sites
- identify and describe, input and output devices
- describe, and use, really simple syndication (RSS) feeds to connect a social network.

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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 website technologies field of work, and include access to:

- a personal computer (PC) and printer
- the internet
- social-media tools and applications
- online instructional 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=a53af4e4-b400-484e-b778-71c9e9d6aff2

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MSAENV472B Implement and monitor environmentally sustainable work practices

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This competency covers the outcomes required to effectively analyse the workplace in relation to environmentally sustainable work practices and to implement improvements and monitor their effectiveness. This unit is based on the sustainability guideline standard GCSSUS02A Implement and monitor environmentally sustainable work practices.

Application of the Unit

Application of the unit	This 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 • Implementing and monitoring improvements in environmental performance. This 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, warehouse etc. This unit will need to be appropriately contextualised as it is applied across an organisation and across different industry sectors.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	This unit has **no** prerequisites	

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. 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 where appropriate. 1.4 Measure and record current resource usage by members of the work group.

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ELEMENT	PERFORMANCE CRITERIA
	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 improvement strategies.	3.1 Source ***techniques***/***tools*** to assist in achieving targets. 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. 4.3 Set new targets and investigate and apply new tools and strategies. 4.4 Promote successful strategies and reward participants where possible.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
Required skills include:

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REQUIRED SKILLS AND KNOWLEDGE
• using relevant environmental and resource efficiency systems, tools and procedures • applying quality assurance systems relevant to own work area • applying relevant supply chain procedures • measurement and calculation techniques • communication/consultation skills to ensure information is supplied to the work group Reading and writing is required to comprehend documentation and interpret environmental and energy efficiency requirements and to document and maintain records Numeracy is required to interpret numeric workplace information, readings and measurements, handle data as required and complete numeric components of workplace forms/reports.
Required knowledge
Required knowledge includes: • how to access and use relevant environmental and resource efficiency systems, tools and procedures • understanding of best practice approaches relevant to own area of responsibility • strategies to maximise opportunities and minimise impacts relevant to own work area • relevant environmental and resource efficiency issues specific to industry practices • methods for measuring and calculating resource usage

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 competence in this unit must be able to provide evidence of the ability to implement and monitor integrated environmental and resource efficiency management policies and procedures within an organisation.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	It is essential that competence is demonstrated in the knowledge and skills defined in this unit. These may include the ability to:

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EVIDENCE GUIDE	
	• monitor and investigate current resource usage • develop plans to improve sustainability • implement environmental improvements. Consistent performance should be demonstrated. For example, look to see that: • environmental performance is routinely monitored and investigated • areas for improvements are followed through and the implemented changes are in turn monitored and investigated.
Context of and specific resources for assessment	This section should be read in conjunction with the range of variables for this unit of competency. Assessors must be satisfied that the person can consistently perform the unit as a whole, as defined by the Elements, Performance Criteria and skills and knowledge. Resources required include suitable access to an operating plant or equipment that allows for appropriate and realistic simulation. A bank of case studies/scenarios and questions will also be required to the extent that they form part of the assessment method. Questioning may take place either in the workplace, or in an adjacent, quiet facility such as an office or lunchroom. No other special resources are required. Access must be provided to appropriate learning and/or assessment support when required. Where applicable, physical resources should include equipment modified for people with disabilities.
Method of assessment	A holistic approach should be taken to the assessment. Competence in this unit may be assessed: • by demonstration in the workplace • using targeted questioning for appropriate portions • through use of specific project(s) • by use of a suitable simulation and/or a range of case studies/scenarios • by a combination of these techniques. In all cases it is expected that practical assessment will be combined with targeted questioning to assess the underpinning knowledge and theoretical assessment will be combined with appropriate practical/simulation or

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EVIDENCE GUIDE	
	similar assessment.
Guidance information for assessment	Assessors need to be aware of any cultural issues that may affect responses to questions. Assessment processes and techniques must be culturally appropriate and appropriate to the oracy, language and literacy capacity of the assessee and the work being performed.

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.	
Procedures	All operations are performed in accordance with procedures. Procedures include all relevant workplace procedures, work instructions, temporary instructions and relevant industry and government codes and standards. Where reference is made to industry codes of practice, and/or Australian/international standards, the latest version must be used.

Environmental and resource efficiency issues	Environmental and resource efficiency issues include:
	• addressing environmental and resource sustainability initiatives such as Environmental Management Systems, action plans, surveys and audits
	• reference to standards, guidelines and approaches such as:
	  • ISO 14001 Environmental Management Systems
	  • Life Cycle Analyses

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RANGE STATEMENT	
	• Cradle to cradle • Global Reporting Initiative • Ecological footprinting • Triple Bottom Line reporting • Product Stewardship • determining enterprise's most appropriate waste treatment including waste to landfill, recycling, re-use and wastewater treatment • applying the waste management hierarchy in the workplace • initiating and/or maintaining appropriate enterprise procedures for operational energy consumption, including stationary energy and non stationary (transport) • efficient use of water • minimising greenhouse gas emissions • use of controls to minimise the risk of environmental damage from hazardous substances
Measure	Measuring techniques include: • material fed to/consumed by plant/equipment • plant meters and gauges • job cards including kanbans • examination of invoices from suppliers • measurements made under different conditions • examination of relevant information and data • others as appropriate to the specific industry contexts.
Techniques and tools	Techniques and tools may includeÂ : • visual workplace concepts • measurement, display and/or recording devices • changed work practices/procedures • competence development and awareness training • process and equipment items
Compliance	Compliance includes meeting relevant federal, state and local government laws, by-laws, regulations and codes of practice.
Incidents	Incidents include:

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RANGE STATEMENT	
	• breaches or potential breaches of regulations • occurrences outside of standard procedure which may lead to lower environmental performance
Purchasing strategies	Purchasing strategies include: • influencing suppliers to take up environmental sustainability • selecting materials/components with a lower environmental profile.
Stakeholders, **key personnel and specialists**	Stakeholders, key personnel and specialists include individuals and groups both inside and outside the organisation that have some direct interest in the enterprise's conduct, actions, products and services, including: • employees at all levels of the organisation • customers • suppliers • other organisations • key personnel within the organisation, and specialists outside it who may have particular technical expertise
Suggestions	Suggestions includes ideas that help to: • prevent and minimise environmental risks and maximise opportunities • reduce emissions of greenhouse gases • reduce use of non-renewable resources • make more efficient use of energy, water and other resources • maximise opportunities to re use and recycle materials • identify strategies to offset or mitigate environmental impacts. e.g. purchasing of carbon credits • express purchasing power through the selection of suppliers with improved environmental performance. e.g. purchasing renewable energy and materials with lower embedded carbon • eliminate the use of hazardous and toxic materials increasing the reusability/recyclability of wastes/products.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Competitive manufacturing tools

Co-requisite units

Co-requisite units		

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MSS015002A Develop strategies for more sustainable use of resources

Modification History

Not applicable.

Unit Descriptor

This unit of competency covers identifying strategies for more sustainable uses of resources. The unit includes the identification of waste as defined in lean manufacturing (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.

Application of the Unit

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. The unit has been developed with manufacturing operations as a focus. However, because of the range of organisations in a typical manufacturing value chain it may also be applied to other types of organisations.

The unit assumes that a decision to attempt to achieve more sustainable use of resources has already been made. The unit covers the skills needed for developing a strategic approach to resource use at the organisation or value chain level.

The unit does not cover the technical skills required to implement specific initiatives that may be identified as part of the strategic plan. However, there is a requirement to present and organise data. The complexity of this requirement will vary according to the type and scale of the organisation's processes. Where required, appropriate mathematics and statistics units should be selected from the MEM05 Metal and Engineering Training Package or other appropriate Training Package.

Where the carbon footprint (or water footprint or similar) of an enterprise or value chain is known, the unit can be applied to developing strategies for the reduction of that footprint.

It would typically be undertaken by a manager or technical specialist who had a major responsibility for sustainability as part of a broader work role, or sustainability may be their primary work responsibility.

For specific techniques covering the auditing of water, energy, emissions and transport, refer to relevant sustainability audit units.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills

Elements and Performance Criteria Pre-Content

Not applicable.

Elements and Performance Criteria

1 Quantify resource consumption	1.1 Identify all significant resources used by process
	1.2 Identify consumption measurements available for each resource
	1.3 Determine 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 Determine loss (emission) for each resource
3 Recommend strategies for reducing 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 as appropriate
	4.4 Draft and present report

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Required Skills and Knowledge

Required knowledge includes:

- the concept of muda. Muda is usually summarised under the headings of the ‘seven wastes’ which include:
  - overproduction
  - delay/waiting
  - transportation
  - over processing
  - excess inventory
  - unnecessary motion
  - defects and rework
- methods of material balancing
- methods of energy balancing
- methods of comparing theoretical with actual resource consumption
- methods for mapping manufacturing processes and resources consumed
- methods of measuring actual resource usage
- concept of muda and muda categories
- muda reduction methods and strategies
- AS/NZS ISO 14000 Environmental Management Standards

Required skills include:

- calculating, manipulating and interpreting numerical data, including establishing series, means and averages, absolute and proportional material and energy usage per product or process, correlations and rates of change
- analysing and conducting root cause analysis
- calculating theoretical consumption of resources as the minimum amount of resources per product or process step as defined by the customer multiplied by the rate of production or process
- calculating actual consumption of resources per unit (e.g. per product, operation, site or value chain)
- writing technical reports
- consulting with technical experts and internal and external stakeholders

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Evidence Guide

Overview of assessment	A person who demonstrates competency in this unit must be able to identify and quantify resources and waste in a process, recommend strategies to reduce waste and prepare a report with recommendations.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessors must be satisfied that the candidate can competently and consistently apply the skills covered in this unit of competency in new and different situations and contexts. Critical aspects of assessment and evidence include: • quantifying significant resource consumption and emission using materials balancing • identifying and consulting with stakeholders • developing strategies for reducing emissions • preparing and presenting a resources use report.
Context of and specific resources for assessment	• This unit of competency is to be assessed in the workplace or a simulated workplace environment. • Assessment should emphasise a workplace context and procedures found in the candidate's workplace. • This unit of competency may be assessed with other relevant units addressing sustainability at the enterprise level or other units requiring the exercise of the skills and knowledge covered by this unit. • The competencies covered by this unit would be demonstrated by an individual working alone or as part of a team.
Method of assessment	• In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. • Where applicable, reasonable adjustment must be made to work environments and training situations to accommodate ethnicity, age, gender, demographics and disability. • The language, literacy and numeracy demands of assessment should not be greater than those required to undertake the unit of competency in a work-like environment.
Guidance information for assessment	

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Range Statement

Waste	Waste in this unit is used in the broader sense of 'muda' as used in lean manufacturing and the competitive manufacturing units of competency developed by Manufacturing Skills Australia (MSA)

Emissions	Emissions means all materials which enter the process/site but which do not leave as part of the product and so includes:
	• known or able to be physically measured emissions of:
	  • gases, vapours and fumes
	  • liquids
	  • solids
	• assumed emissions through material balancing
	• assumed emissions through energy loss, including heat, friction and other energy conversion yield losses

Theoretical consumption	Theoretical consumption of resources is the minimum amount of resources per product as defined by the customer multiplied by the rate of production
Actual consumption	Actual consumption is the amount of a resource entering the value chain
Significant resources	Significant resources includes resources which are deemed to be significant because they are: • high volume • high value • high environmental significance • important to the product or process • covered by legislation or regulation • important to the enterprise It need not include resources which are incidental to the activity and which are not otherwise significant

Unit Sector(s)

Sustainability

Custom Content Section

Not applicable.

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PSPETHC301B Uphold the values and principles of public service

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit of competency describes the outcomes required to demonstrate ethical conduct required of those in public service. It includes applying ethical standards and dealing with ethical problems.

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

Application of the Unit

This unit supports the attainment of skills and knowledge required for applying ethical conduct and accountability required in those working in government employment.

In practice, ethical conduct is demonstrated in the context of other generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or services, etc.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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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 required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Apply ethical standards	1.1 Interpretation of ***ethical values and principles*** is reviewed with senior staff to ensure accuracy. 1.2 Personal ***work practices*** are undertaken in compliance with public sector ethics standards, organisational policy and ***guidelines.*** 1.3 Verbal and written advice and reports are prepared containing information which is impartial, substantiated, accurate and complete. 1.4 Public ***resources*** are ***used*** in accordance with public sector ethics standards, organisational policy and guidelines. 1.5 ***Conflicts of interest*** are identified, declared, addressed and documented in accordance with policy and procedures. 1.6 Personal behaviour and relationships with the public, suppliers and business contacts are conducted in accordance with ethics standards, policy and guidelines.
2. Deal with ethical problems	2.1 Situations which pose ethical problems are resolved or ***referred*** in accordance with organisational guidelines. 2.2 Decision-making ***processes*** used to resolve ethical problems are recorded in accordance with organisational policy and procedures. 2.3 Organisational policies/codes on the prevention and reporting of ***unethical conduct*** are accessed and applied.

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Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

Look for evidence that confirms skills in:

- applying objective and impartial evaluation of conflicting requirements
- using ethical decision making
- preparing written advice and reports requiring accuracy of expression
- accessing legislation and codes of ethics electronically or in hard copy
- tailoring communication to suit different audiences
- responding to diversity, including gender and disability
- applying occupational health and safety procedures relating to ethical work practices

Required knowledge:

Look for evidence that confirms knowledge and understanding of:

- the nature of ethics and ethical values
- fundamental ethical principles such as justice, respect for persons, procedural fairness, confidentiality, responsible care
- values of public sector office
- natural justice/procedural fairness
- equal employment opportunity, equity and diversity principles
- where to access ethical decision making/problem solving models, organisational codes and procedures
- procedures for declaring conflicts of interest
- protocols for reporting fraud, corruption and maladministration
- occupational health and safety procedures relating to ethical work practices

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for the Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

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- PSPGOV303B Build and maintain internal networks
- PSPGOV305B Access and use resources and financial systems
- PSPGOV307B Organise workplace information
- PSPGOV308B Work effectively with diversity
- PSPGOV309A Address client needs
- PSPGOV312A Use workplace communication strategies
- PSPGOV314A Contribute to conflict management
- PSPIM301A Process claims
- PSPLAND302A Investigate tenure and land use history
- PSPLEGN301B Comply with legislation in the public sector
- PSPOHS301A Contribute to workplace safety
- PSPPROC302A Undertake basic procurement

- This unit should be co-assessed with other units to supply the context for ethical behaviour

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- ethical conduct in a range of (3 or more) contexts (or occasions, over time) where contexts may be generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or services etc

Resources required to carry out assessment

These resources include:

- ethics-related legislation and guidelines
- codes of conduct and codes of ethics
- public sector standards, procedures and protocols
- ethical decision making/problem solving models
- manager/mentor/network who role models ethical conduct

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when working ethically in a public sector environment, including coping with ambiguity, difficulties, irregularities and breakdowns in routine
- ethical conduct in a range of (3 or more) contexts (or occasions, over time) where contexts may be generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or

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	services etc. Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: • people with disabilities • people from culturally and linguistically diverse backgrounds • Aboriginal and Torres Strait Islander people • women • young people • older people • people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: • case studies • portfolios • questioning • scenarios • simulation or role plays • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs if the candidate, accessibility of the item, and local industry and regional contexts.	
Ethical values and principles may include:	• respect for the law • integrity • objectivity • accountability • honesty • openness • responsibility • impartiality • diligence

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	• trustworthiness
	• confidentiality
	• respect for persons
	• responsible care
	• probity
	• economy and efficiency
	• natural justice/procedural fairness, that is:
	  • the right to be heard/put your case
	  • the right to be informed of a complaint or case against you
	  • the right to know the outcomes/recommendations of an investigation involving you
	  • the right to know reasons for decisions affecting you
	  • the right to privacy
	  • the right to representation
	  • the right to silence
	• the decision maker should not be a judge in his/her own cause

Work practices may include:	• behaviours • conduct • relationships with work colleagues, external individuals and organisations • the manner in which work activities are carried out
Legislation and guidelines may include:	• legislation for public sector management • freedom of information • privacy legislation • equal employment opportunity and anti-discrimination law • public sector standards • Ministerial directions • State/Territory or Commonwealth codes of ethics • organisational codes of conduct • sets of values • organisational mission and values statements • organisational policy, procedures/guidelines • government policy • professional codes of ethics and conduct • equity guidelines, workplace diversity guidelines
Public resources may include:	• time • stationery • equipment • telephones • Internet • Email

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Use of public resources includes:	• effective use • efficient use - avoiding/minimising waste • not for private use
Conflicts of interest may include:	• potential, perceived and actual conflicts • bribery • improper use of official information • improper use of resources, including plant and equipment • acceptance of gifts • entertainment • previous and outside employment, including voluntary work • favours for friends and/or relatives • memberships of organisations • political activity • pecuniary and non-pecuniary conflicts
Ethical problems which may need to be ***referred*** rather than resolved at this level may include:	• conflict between public sector standards and personal values • conflict between public sector standards and other standards such as professional standards • conflict between public sector standards and directions of a senior officer or Minister • tension between two 'rights', for example, the right to privacy versus the right to freedom of information • conflict regarding issues of personal and organisational intellectual property
Referrals of ethical problems may be made to:	• line management • chief executive officer • public service commissioner • public sector standards body • organisational ethics committee • internal grievance mechanisms, including identified officers • confidant programs (whistleblower protection programs) • organisational professional reporting procedures • unions and professional bodies • ombudsman • police
Processes for resolving ethical problems may include:	• accessing relevant standards and other information • withdrawing from a situation • using models of ethical decision making/problem solving • reflection, discussion, seeking clarification from others.
Unethical conduct may include:	• fraud, corruption, maladministration and waste • unauthorised access to and/or use of information, money/finances, vehicles, equipment, resources, time • improper actions during contractual processes, such as release

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	of intellectual property, infringing copyright, release of tender information, inappropriate disclosure during tender process • improper public comment on matters relating to the government and/or the organisation • falsifying records • giving false testimonials • dishonesty • improper use of plant and equipment, credit cards, frequent flyer points, telephones, email and Internet • extravagant or wasteful practices • personal favours • preferential treatment • putting barriers in place, hindering, blocking action • compromising behaviour including sexual harassment • lack of confidentiality • directing others to act unethically • oppressive/coercive management decisions • resorting to illegality to obtain evidence

Unit Sector(s)

Not applicable.

Competency field

Ethics and Accountability.

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PSPETHC401A Uphold and support the values and principles of public service

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the ethical conduct required of those in public service and the responsibility to encourage ethical conduct in others - colleagues or supervised staff. It includes contributing to an ethical public sector workplace and participating in ethical decision making.

In practice, ethical conduct is demonstrated in the context of other generalist or specialist work activities such as applying government processes, delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, awarding contracts etc.

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

Application of the Unit

This unit supports the attainment of skills and knowledge required for applying ethical conduct and accountability required in those working in government employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to an ethical public sector workplace	1.1 Information on the ***ethical values and principles*** of the workplace is accessed, its interpretation confirmed with others and applied accordingly 1.2 Application of ethical values and principles is discussed with senior management and colleagues to ensure common understanding and application 1.3 ***Others*** are assisted to access and use public sector ethics ***legislation and guidelines*** to ensure their work practices comply with requirements 1.4 The differences between public sector ethics/values and personal beliefs/values are explained to others to encourage understanding and compliance 1.5 Hypothetical work practices that would constitute ***unethical conduct*** are identified and discussed with work colleagues, and strategies to avoid or deal with them are identified in accordance with organisational policy and procedures
2. Participate in ethical decision making	2.1 Real and potential ***ethical problems*** are identified, and decision making processes are used to resolve or ***refer*** them in accordance with organisational policy and procedures 2.2 Information is regularly accessed to ensure currency in ethical knowledge, and ethical judgment is developed through involvement in workplace discussions or ongoing professional development related to ethical standards and practices 2.3 Other staff are supported as necessary to contribute to ethical discussions and problem solving to develop their ethical judgment 2.4 Processes for preventing and reporting unethical conduct are used and others are assisted in their application

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Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- accessing legislation and codes of ethics electronically or in hard copy
- reading complex and formal documents such as legislation and codes of ethics, applying them and assisting others to apply them to work practices
- applying objective and impartial evaluation of ethical problems
- using participative ethical decision making/problem solving
- preparing written reports that contain information that is impartial, substantiated, accurate and complete
- responding to diversity, including gender and disability
- adjusting communication to suit different audiences
- applying occupational health and safety procedures relating to ethical work practices

Required knowledge:

Look for evidence that confirms knowledge and understanding of:

- the nature of public sector ethics and ethical values as opposed to personal beliefs/value systems
- fundamental ethical principles such as justice, respect for persons and responsible care
- other ethics standards such as professional standards
- natural justice/procedural fairness
- equal employment opportunity, equity and diversity principles
- ethical decision making/problem solving models
- procedures and protocols for reporting unethical conduct
- environmental and occupational health and safety procedures relating to ethical work practice

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to

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increase the efficiency and realism of the assessment process include, but are not limited to, a range of (2 or more) generalist or specialist units of competency in the Certificate IV in Government. Choice from the following units is recommended:

- PSPGOV402B Deliver and monitor service to clients
- PSPGOV403B Use resources to achieve work unit goals
- PSPGOV406B Gather and analyse information
- PSPGOV408A Value diversity
- PSPGOV411A Deal with conflict
- PSPGOV412A Use advanced workplace communication strategies
- PSPGOV414A Provide workplace mentoring
- PSPGOV422A Apply government processes
- PSPLEGN401A Encourage compliance with legislation in the public sector
- PSPPROC409A Receive and select offers
- PSPREG407B Produce formal record of interview
- PSPREG410B Give evidence

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- ethical conduct demonstrated and supported in others in a range of (3 or more) contexts (or occasions, over time) where contexts include generalist or specialist work activities such as applying government processes, delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, awarding contracts, etc

Resources required to carry out assessment

These resources include:

- ethics-related legislation and guidelines
- codes of conduct and codes of ethics
- public sector standards, procedures and protocols
- ethical decision making models

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when working ethically in a public sector environment, including coping with ambiguity, difficulties, irregularities and breakdowns in routine
- ethical conduct demonstrated and supported in others in a range

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of (3 or more) contexts (or occasions, over time) where contexts include generalist or specialist work activities such as applying government processes, delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, awarding contracts, etc

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Ethical values and principles may include:	• respect for the law • integrity • objectivity • accountability

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	• honesty
	• openness
	• responsibility
	• impartiality
	• diligence
	• trustworthiness
	• confidentiality
	• respect for persons
	• responsible care
	• probity
	• economy and efficiency
	• natural justice/procedural fairness, that is:
	  • the right to be heard/put your case
	  • the right to be informed of a complaint or case against you
	  • the right to know reasons for decisions affecting you
	  • the right to know the outcomes/recommendations of an investigation involving you
	  • the right to privacy
	  • the right to representation
	  • the right to silence
	• the decision maker should not be a judge in his/her own cause

Others may include:	• colleagues • supervised staff • contractors
Legislation and guidelines may include:	• legislation for public sector management • freedom of information • privacy legislation • equal employment opportunity and anti-discrimination law • public sector standards • Ministerial directions • State/Territory/Commonwealth codes of ethics • organisational codes for conduct/ethics • organisational mission and values statements • organisational policy, procedures/guidelines • government policy • professional codes of ethics and conduct • equity guidelines, organisational workplace diversity guidelines
Unethical conduct may include:	• fraud, corruption, maladministration and waste • unauthorised access to and/or use of information, money/finances, vehicles, equipment, resources, time • improper actions during contractual processes, such as release

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	of intellectual property, infringing copyright, release of tender information, inappropriate disclosure during tender process • improper public comment on matters relating to the government and/or the organisation • falsifying records • giving false testimonials • dishonesty • improper use of plant and equipment, credit cards, frequent flyer points, telephones, email and Internet • extravagant or wasteful practices • personal favours • preferential treatment • putting barriers in place, hindering, blocking action • compromising behaviour including sexual harassment • lack of confidentiality • directing others to act unethically • oppressive/coercive management decisions • resorting to illegality to obtain evidence
Ethical problems which may need to be referred rather than resolved at this level may include:	• conflict between public sector standards and personal values • conflict between public sector standards and other standards such as professional standards • conflict between public sector standards and directions of a senior officer or Minister • tension between two 'rights' - for example, the right to privacy versus the right to freedom of information • conflict regarding issues of personal and organisational intellectual property
Referrals of ethical problems may be made to:	• line management • human resources • workplace relations officer • grievance officer • chief executive officer • public service commissioner • public sector standards body • organisational ethics committee • internal grievance mechanisms • confidant programs (whistleblower protection programs) • organisational professional reporting procedures • unions and professional bodies • ombudsman

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Unit Sector(s)

Not applicable.

Competency field

Ethics and Accountability.

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PSPETHC501B Promote the values and ethos of public service

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the responsibility of those in public service to model and encourage in others the highest standards of ethical conduct. It includes promoting ethical standards, assisting staff to avoid conflicts of interest, and modelling and fostering integrity of conduct.

In practice, ethical conduct is demonstrated in the context of other generalist or specialist work activities such as developing client services, coordinating financial resources, providing human resource services, conducting investigations, letting contracts etc.

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

Application of the Unit

This unit supports the attainment of skills and knowledge required for applying ethical conduct and accountability required in those working in government employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Promote ethical standards	1.1 Interpretation of ethical standards is discussed with senior staff to ensure common understanding of requirements
	1.2 The ethical obligations of public service and the ***consequences of unethical conduct*** are explained to others in a manner suited to their levels of understanding, experience and specific needs
	1.3 Conduct of self and others is assessed against ***ethics standards, legislation and guidelines***, and feedback or assistance is timely, constructive, and consistent
	1.4 Impartial, culturally and politically neutral advice is provided in accordance with organisational procedures
	1.5 Resolution and/or ***referral of ethical problems*** identified in dealings with staff and the public are used as learning opportunities within the workgroup without compromising privacy and confidentiality considerations
2. Assist staff to avoid conflicts of interest	2.1 ***Conflict of interest*** requirements are explained to staff using language and supporting material suitable to their needs and the situations they are likely to experience
	2.2 Matters involving competing interests or conflicting views on appropriate action are discussed with staff, and resolved or referred in accordance with policy and guidelines
3. Model and foster integrity of conduct	3.1 Personal work practices are used to provide a consistent example of desired ethical conduct, and staff/team values are developed through collaboration and leadership
	3.2 Ethical, lawful and reasonable directions are provided to staff, and protection is provided from reprisals for refusing others' directions to act unethically
	3.3 The ***principles of procedural fairness*** are modelled and explained to others using strategies and language suited to their levels of understanding, experience and specific needs

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ELEMENT	PERFORMANCE CRITERIA
	3.4 Decision making which upholds ethical standards is used, promoted and explained to others
	3.5 The risk of ***unethical conduct*** is assessed in accordance with organisational guidelines, and changes to policies or practices are recommended to improve outcomes
	3.6 The ***reporting*** of suspected unethical conduct is encouraged, dealt with in a confidential manner and acted on promptly, and in accordance with policy and procedures

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- public sector ethics
- organisational code of ethics/conduct
- legislation related to privacy, freedom of information, human rights, whistleblower protection
- procedural fairness
- equal employment opportunity, equity and diversity principles
- procedures for declaring conflicts of interest
- procedures or protocols for reporting unethical conduct
- occupational health and safety procedures relating to ethical work practices

Skill requirements

Look for evidence that confirms skills in:

- 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
- responding to diversity, including gender and disability
- assisting others to apply occupational health and safety and environmental procedures relating to ethical work practices

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Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to, a range of (2 or more) generalist or specialist units of competency at Diploma level. Choice from the following units is recommended:
  - PSPGOV502B Develop client services
  - PSPGOV503B Coordinate resource allocation and usage
  - PSPGOV506A Support workplace coaching and mentoring
  - PSPGOV511A Provide leadership
  - PSPGOV508A Manage conflict
  - PSPGOV517A Coordinate risk management
  - PSPHR503A Facilitate performance management processes
  - PSPLEGN501B Promote compliance with legislation in the public sector
  - PSPPM502B Manage complex projects
  - PSPPROC502A Establish contract management arrangements
  - PSPPROC503A Manage contract performance
  - PSPREG501B Conduct prosecutions

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- promotion of the values and ethos of public service in a range of (3 or more) contexts (or occasions, over time) where contexts include generalist or specialist work activities such as developing client services, coordinating financial resources, providing human resource services, conducting investigations, letting contracts etc

Resources required to carry out assessment

These resources include:

- ethics-related legislation and guidelines

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- codes of conduct and codes of ethics
- public sector standards, procedures and protocols
- ethical decision making/problem solving models

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when working ethically and promoting ethical behaviour in others in a public sector environment, including coping with ambiguity, difficulties, irregularities and breakdowns in routine
- promotion of the values and ethos of public service in a range of (3 or more) contexts (or occasions, over time) where contexts include generalist or specialist work activities such as developing client services, coordinating financial resources, providing human resource services, conducting investigations, letting contracts etc

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.	
Consequences of unethical behaviour may include:	• disciplinary action • transfer • demotion • dismissal • legal liability • that outlined in legislation, policy and/or guidelines
Ethics standards may include:	• public sector standards • standards referred to in State/Territory/Commonwealth legislation • codes of ethics • organisational codes of conduct • organisational mission and values statements • organisational procedures/guidelines • government policy • professional standards
Legislation and guidelines may include:	• legislation for public sector management • freedom of information legislation • privacy legislation • equal employment opportunity and anti-discrimination law • public sector standards • equity guidelines • workplace diversity guidelines • Ministerial directions • State/Territory/Commonwealth codes of ethics • organisational codes of conduct • organisational mission and values statements • organisational policy, procedures/guidelines • government policy • legal precedents
Referrals of ethical problems may be made to:	• line management • human resources • workplace relations officer • grievance officer • chief executive officer

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	• public service commissioner • public sector standards body • organisational ethics committee • internal grievance mechanisms • confidant programs (whistleblower protection programs) • organisational professional reporting procedures • unions and professional bodies • ombudsman
Ethical problems which may need to be referred rather than resolved at this level may include:	• conflict between public sector standards and personal values • conflict between public sector standards and other standards such as professional standards • conflict between public sector standards and directions of a senior officer or Minister • tension between two 'rights' for example, the right to privacy versus the right to freedom of information • conflict regarding issues of personal and organisational intellectual property
Conflicts of interest may include:	• perceived, potential and actual conflicts • bribery • improper use of official information • offers of gifts, entertainment • outside employment • intellectual property • favours for friends, relatives and others • memberships of organisations • political activity • pecuniary and non-pecuniary conflicts • conflicts relating to tendering and contracting
Principles of procedural fairness may include:	• the right to be heard/put your case • the right to be informed of a complaint or case against you • the right to be advised of the outcome/recommendations of an investigation involving you • the right to know reasons for decisions affecting you • the right to privacy • the right to representation • the right to remain silent • the decision maker should not be a judge in his/her own cause • in accordance with the law
Unethical conduct may include:	• fraud, corruption, maladministration and waste • unauthorised access to and use of information, money/finances, vehicles, equipment, resources • improper public comment on matters relating to the government

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	and/or the organisation • falsifying records • giving false testimonials • dishonesty • improper use of telephones, credit cards, frequent flyer points, email and Internet • extravagant or wasteful practices • personal favours, preferential treatment • putting barriers in place, hindering, blocking action • compromising behaviour including sexual harassment • directing others to act unethically • oppressive/coercive management decisions • resorting to illegality to obtain evidence
Actions relating to the reporting of unethical conduct may include:	• protection and support of those reporting unethical conduct • informal, low key investigation and evidence gathering to confirm allegations • referral to authority identified in guidelines • use of confidant programs such as whistleblower protection programs or organisational professional reporting procedures

Unit Sector(s)

Not applicable.

Competency field

Ethics and Accountability

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PSPGOV314A Contribute to conflict management

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the requirement to contribute to conflict management in the workplace between self and others, such as staff or clients. It includes recognising the presence of conflict, dealing with emotions, overcoming barriers to communication, gathering the facts, agreeing on and implementing action. It does not include managing conflict between two other parties, formal negotiation, counselling or conducting mediation.

In practice, contributing to conflict management may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, working effectively, working with diversity, using workplace communication strategies, etc.

This is one of 4 units of competency in the *Working in Government* and *Human Resource Management* Competency Fields that deal with conflict. Related units are:

- PSPGOV411A Deal with conflict
- PSPGOV508A Manage conflict
- PSPHR603B Provide advisory and mediation services
-
- No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication

Application of the Unit

Not applicable.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Recognise the presence of conflict	1.1 ***Conflict situations*** and/or the potential for conflict are recognised and confirmed. 1.2 The signs, stages and ***causes of conflict*** are identified. 1.3 ***Conflict situations*** are avoided where appropriate, and assistance sought when necessary. 1.4 Records of actual/potential conflict are completed in accordance with organisational policy and procedures.
2. Deal with emotions	2.1 Own behaviour and feelings about the situation are reflected on. 2.2 Own emotions are recognised and managed. 2.3 The other party's emotions are acknowledged and dealt with in a manner that prevents escalation.
3. Overcome barriers to communication	3.1 Barriers to effective communication are identified. 3.2 Factors and issues relevant to the situation are identified, clarified and confirmed using appropriate ***communication techniques***. 3.3 Third party support is sought if necessary in accordance with ***legislation, policy and procedures***. 3.4 ***Social and cultural differences*** are taken into account in the communication style and approach taken.

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ELEMENT	PERFORMANCE CRITERIA
4. Gather the facts	4.1 The other party is encouraged to relate the facts as they see them. 4.2 Information from the other party, as well as emotions or behaviour, is assessed. 4.3 Facts from own point of view are shared with the other party objectively . 4.4 Additional information is gathered and included where possible, to ensure all perspectives are considered.
5. Agree on and implement action	5.1 ***Strategies*** to solve the problem/issue are determined in consultation with the other party. 5.2 Where necessary, approval on agreed strategies is obtained in accordance with organisational policy and procedures, and strategies are implemented. 5.3 Progress is monitored with other party to confirm the effectiveness of the agreed action. 5.4 Records and reports are completed in accordance with legislation, organisational policy and procedures. 5.5 Where agreement cannot be reached on strategies for resolution, the problem/issue is referred in accordance with organisational policy and procedures.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- using a range of communication techniques with a diverse workforce and client base including assertiveness, listening, non-verbal communication, language style, problem solving
- using problem solving to deal with unexpected issues or attitudes
- dealing with difficult situations and people
- responding to diversity, including gender and disability
- applying procedures relating to occupational health and safety and environment in the context of conflict resolution

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, organisational policies, procedures and guidelines relating

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to managing conflict in the public sector workplace, including equal employment opportunity, diversity, anti-discrimination, harassment, occupational health and safety, privacy, confidentiality, freedom of information
- types of conflict in the workplace and typical causes
- conflict theory including signs, stages, levels, factors involved, results
- group processes and roles people play
- organisational structures and workplace culture
- different social and cultural practices
- conflict resolution skills and strategies
- personal power and positional power
- grievance procedures in the public sector
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of conflict resolution

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPETHC301B Uphold the values and principles of public service
  - PSPGOV301B Work effectively in the organisation
  - PSPGOV302B Contribute to workgroup activities
  - PSPGOV308B Work effectively with diversity
  - PSPGOV312A Use workplace communication strategies
  - PSPLEGN301B Comply with legislation in the public sector
  - PSPOHS301A Contribute to workplace safety

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- contribution to conflict management in a range of (3 or more)

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contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to the public sector
- grievance procedures in the public sector
- strategies and guidelines for dealing with workplace conflict
- case studies and workplace scenarios to capture the range of situations likely to be encountered when contributing to conflict management

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when contributing to conflict management, including coping with difficulties, irregularities and breakdowns in routine
- contribution to conflict management in a range of (3 or more) contexts (or occasions, over time)

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.	
Conflict situations may relate to:	• conflicts with work colleagues • refusals to follow directions/guidance • customer complaints/dissatisfaction • disagreements with members of the public • bystander behaviour • drug or alcohol affected persons • persons suffering emotional distress
Causes of conflict may include:	• personality clashes • poor communication • competing needs • cross-cultural issues • abuse of power • workplace bullying • customer dissatisfaction • gender issues • inter-generational issues
Conflict solutions may include:	• unsafe situations • escalating situations • situations presenting physical danger • situations beyond one's level of expertise or comfort zone
Communication techniques may include:	• verbal and non-verbal language • questioning and listening • cooperative language • control of emotions, voice and body language • constructive feedback • reflection • summarising • re-phrasing • paraphrasing • presenting options • using language and concepts suited to the occasion and the other party • showing a willingness to compromise
Legislation, policies and	• State/Territory or Commonwealth legislation, regulations,

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procedures may include:	organisational policies, procedures and guidelines relating to the conflict management in the public sector, including equal employment opportunity, diversity, anti-discrimination, harassment, occupational health and safety, privacy, confidentiality, freedom of information • public sector standards • codes of practice • codes of ethics • security standards
Social and cultural differences may include:	• beliefs and values • social conventions • family relationships • codes of conduct • cultural observances • verbal and non-verbal language
Strategies may include:	• a partnership approach • working cooperatively on solving the problem • third party assistance • mediation

Unit Sector(s)

Not applicable.

Competency field

Working in Government.

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PSPGOV406B Gather and analyse information

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers collection and analysis of information to achieve work unit objectives and meet client needs. It includes identifying and collecting information, analysing and interpreting information, developing and applying workable solutions, presenting information and maintaining information.

In practice, gathering and analysing information may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government processes, using resources, gathering evidence, carrying out projects, using financial processes, identifying and treating risks, monitoring for fraud, undertaking, court listings, conducting claim assessments, etc.

This is one of 5 units of competency in the *Working in Government* and *Management* Competency Fields that deal with information/knowledge management. Related units are:

- PSPGOV206B Handle workplace information
- PSPGOV307B Organise workplace information
- PSPGOV504B Undertake research and analysis
- PSPMNGT614A Facilitate knowledge management

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

Application of the Unit

Not applicable.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Identify and collect information**	1.1 Nature, extent and purpose of required ***information*** is identified. 1.2 Internal and external ***sources*** are identified and accessed to produce required information in accordance with ***legislation, policy and procedures***. 1.3 Information is collected, organised, recorded and reported in accordance with organisational procedures and defined guidelines. 1.4 Information collected is organised in a way which enables easy access and retrieval by other staff.
2. **Analyse and interpret information**	2.1 Information and its sources are critically evaluated for relevance and validity to business/client requirements. 2.2 Basic ***analysis of information*** is undertaken as required to identify key issues. 2.3 More detailed analysis of information is carried out as required using relevant techniques including mathematical calculations and methods for numerical/graphical information.
3. **Develop and apply workable solutions**	3.1 Workable solutions to business/client requirements are developed on consideration of analysed information. 3.2 Proposed solutions are communicated or implemented as

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ELEMENT	PERFORMANCE CRITERIA
	required.
4. **Present information**	4.1 Information is reported in the required format, style, structure and timeframe.
	4.2 ***Information is presented*** in required medium in accordance with organisational requirements using relevant technology.
5. **Maintain information**	5.1 A range of standard and complex ***information systems*** and operations is used in accordance with organisational policy and procedures.
	5.2 Information and records are maintained in accordance with organisational procedures to ensure data and system integrity.
	5.3 Routine data and records are reconciled as required.
	5.4 Inadequacies in system/s relating to information retrieval are identified and corrected or reported to relevant staff as required.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying public sector legislation such as occupational health and safety and environment in the context of information management
- accessing and using information ethically and legally
- using manual and computerised techniques for information management
- applying computer technology to data storage, security, retrieval and presentation
- using basic statistical and numerical manipulation
- using critical analysis techniques
- communicating with colleagues and supervisors
- presenting information in a range of ways such as report format, numerically, in tables, with graphs, spatially
- responding to diversity, including gender and disability
- using problem solving and referring problems as required
- applying equal employment opportunity, equity and diversity principles

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, policies, procedures and guidelines relating to information handling in the public sector, such as confidentiality, privacy, security, freedom of information

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- data collection and management procedures
- organisational information handling and storage procedures
- cultural aspects of information and meaning
- sources of public sector work-related information
- economic, legal, security and social issues surrounding the use of information
- public sector standards
- electronic and manual filing systems
- databases and data storage systems
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of information management

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPCRT407A Undertake court listings
  - PSPETHC401A Uphold and support the values and principles of public service
  - PSPFIN401A Use public sector financial processes
  - PSPFRAU401B Monitor data for indicators of fraud
  - PSPGOV402B Deliver and monitor service to clients
  - PSPGOV403B Use resources to achieve work unit goals
  - PSPGOV404B Develop and implement work unit plans
  - PSPGOV405B Provide input to change processes
  - PSPGOV407B Provide a quotation
  - PSPGOV417A Identify and treat risks
  - PSPGOV422A Apply government processes
  - PSPIM401A Conduct initial claim assessments
  - PSPLEGN401A Encourage compliance with legislation in the public sector
  - PSPPM404A Carry out simple project activities
  - PSPREG411A Gather information through interviews

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- PSPREG412A Gather and manage evidence
- PSPSEC405A Handle security classified information

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- information gathered and analysed in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to information research, presentation and management
- access to electronic information/records management systems
- Case studies and workplace scenarios to capture the range of situations likely to be encountered when gathering and analysing information

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when gathering and analysing information, including coping with difficulties, irregularities and breakdowns in routine
- information gathered and analysed in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios

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	• simulation or role plays • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Information may include:	• legislation, guidelines and awards • organisation, legal and policy materials • client information • market trends • media reports • registries and file records • library materials • financial records • basic statistical information • human resources/personnel records • asset records • meta-data

Sources of information may include:	• those internal to the organisation such as:
	  • intranet
	  • databases/files
	  • library collections
	  • internal publications
	  • annual reports
	  • newsletters
	  • other staff
	• those external to the organisation such as:
	  • Internet
	  • local, state, national and international libraries and archives
	  • other organisations' publications

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	• staff in external organisations
Legislation**, **policy and procedures may include:	• Commonwealth and State/Territory legislation, standards and guidelines especially relating to privacy, confidentiality, freedom of information, security, fraud control, copyright, intellectual property • government policy • public sector code of ethics • national standards • Australian standards such as records management, knowledge management, risk management • the organisation's policies/practices/code of conduct
Analysis of information may include:	• qualitative analysis • quantitative analysis • critical analysis • problem solving • matching • statistical analysis • mathematical calculations • forecasting
Presentation of information may include:	• routine reports and submissions • briefing notes, Ministerials • proposals, project plans • articles and promotional material • tabular or graphical presentation • overhead transparencies • slideshow data presentation • face-to-face • telephone
Information systems may include:	• file/records management systems • personnel/human resources systems • specific purpose databases • library systems • data warehouse systems • web sites • financial information systems • workplace communication systems

Unit Sector(s)

Not applicable.

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Competency field

Working in Government.

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PSPGOV407B Provide a quotation

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the conduct of 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.

In practice, providing a quotation may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government processes, gathering and analysing information, using resources, etc.

This is one of 2 unit of competency in the *Working in Government* Competency Field dealing with quoting/tendering for work. The related unit is:

- PSPGOV603B Develop a tender submission response

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Clarify requirements**	1.1 Requirements are confirmed with the funder/purchaser in accordance with organisational policy and procedures.
	1.2 Market research is conducted in accordance with ***legislation, policy and procedures*** to confirm the viability of providing a quotation.
2. **Establish costs and availability of resources**	2.1 Costs for labour, equipment or materials are obtained in accordance with organisational policy and procedures and included in the quotation in full.
	2.2 Availability of equipment, materials or personnel is confirmed for the timeframe required.
	2.3 Infrastructure costs to the organisation of providing the goods or services are included.
	2.4 Cost or benefit from any asset disposal at the conclusion of the contract is included.
3. **Prepare estimate**	3.1 Estimate is prepared to take account of all requirements and allow for contingencies.
	3.2 Estimate is structured to provide for cost recovery or to return a profit according to legislation, policy and procedures.
	3.3 Costs are estimated to enable provision of goods or ***services*** to the standards required by the ***client***.
	3.4 Estimate is checked for accuracy and detailed in accordance with organisational procedures and client requirements.
4. **Prepare and submit quotation**	4.1 Quotation is prepared in accordance with organisational policy and procedures.

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ELEMENT	PERFORMANCE CRITERIA
	4.2 Required details are included to meet client requirements.
	4.3 Quotation is submitted within required timeframe.
	4.4 Organisational recordkeeping requirements for providing quotations are met.
5. Take follow-up action	5.1 Changes and variations to the quotation are negotiated to meet the needs of the client and the organisation, in accordance with policy, procedure and delegated authority.
	5.2 Proposal, outcome and preparation process are evaluated using feedback from a range of ***stakeholders*** and the results are used to improve subsequent quotations.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- using numeracy for selecting and applying mathematical concepts, estimating, checking reasonableness of results
- using a range of 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
- responding to diversity, including gender and disability
- applying legislation and guidelines including occupational health, safety and environment when providing quotations

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, 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

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- 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
- equal employment opportunity, equity and diversity principles
- public sector legislation including occupational health, safety and environment, in the context of providing quotations

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPETHC401A Uphold and support the values and principles of public service
  - PSPGOV403B Use resources to achieve work unit goals
  - PSPGOV404B Develop and implement work unit plans
  - PSPGOV406B Gather and analyse information
  - PSPGOV412A Use advanced workplace communication strategies
  - PSPGOV413A Compose complex workplace documents
  - PSPGOV417A Identify and treat risks
  - PSPGOV421A Exercise delegations
  - PSPGOV422A Apply government processes
  - PSPLEGN401A Encourage compliance with legislation in the public sector

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- quotations prepared and submitted in a range of (3 or more) contexts (or occasions, over time)

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Resources required to carry out assessment	These resources include: • legislation, policy, procedures and protocols relating to proving quotations • case studies and workplace scenarios to capture the range of situations likely to be encountered when proving quotations
Where and how to assess evidence	Valid assessment of this unit requires: • a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when proving quotations, including coping with difficulties, irregularities and breakdowns in routine • quotations prepared and submitted in a range of (3 or more) contexts (or occasions, over time). Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: • people with disabilities • people from culturally and linguistically diverse backgrounds • Aboriginal and Torres Strait Islander people • women • young people • older people • people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: • case studies • portfolios • projects • questioning • scenarios • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the

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Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.	

Legislation, ***policies and procedures*** may include:	• State/Territory and Commonwealth legislation and regulations such as:
	  • public sector management acts
	  • privacy legislation
	  • freedom of information
	  • equal employment opportunity, anti-discrimination and harassment legislation
	  • employment legislation
	  • occupational health and safety legislation
	• ethics and accountability standards
	• public sector standards
	• organisational policy, procedures and protocols
	• international legislation/codes of behaviour
	• enterprise bargaining agreements
	• award conditions/requirements
	• strategic and business plans
	• delegation guidelines

Services quoted may include:	• electronic • computerised • bureau services • procedural systems • training • mechanical
Clients may include:	• private sector organisations • Commonwealth, State/Territory, Local Government organisations • intra-organisation units
Stakeholders may include:	• clients • managers • peers

Unit Sector(s)

Not applicable.

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Competency field

Working in Government.

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PSPGOV422A Apply government processes

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the application of a knowledge of government processes. It includes applying information relating to Machinery of Government, and applying knowledge of organisational functions and protocols Legislation/regulations applying across the public sector, such as equal employment opportunity, equity and diversity etc, are not addressed here, as these are covered in *PSPLEGN401A Encourage compliance with legislation in the public sector*.

In practice, knowledge of government processes is applied in the context of other generalist and specialist work activities such as delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, awarding contracts etc.

This is one of 3 units of competency in the *Working in Government* Competency Field that deal with government processes. Related units are:

- PSPGOV515A Develop and use political nous
- PSPGOV601B Apply government systems

This unit replaces *PSPGOV401A Apply knowledge of government processes*. The units are not equivalent as this unit has additional knowledge requirements, and 2 additional performance criteria for dealing with ambiguity in the public sector; further, an element relating to legislation has been deleted because of overlap with *PSPLEGN401A Encourage compliance with legislation in the public sector*

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

Application of the Unit

Not applicable.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Apply information relating to the Machinery of Government**	1.1 Up-to-date information relating to ***Machinery of Government*** relevant to work responsibilities is identified, accessed and applied. 1.2 Ambiguity in the structure and function of the organisation or work area as a result of past, present or future Machinery of Government changes is identified and advice obtained and implemented on required work priorities and outcomes for the transition period. 1.3 Role ambiguity as a result of past, present or future Machinery of Government changes is managed in accordance with organisational directions.
2. **Apply knowledge of organisational functions**	2.1 Up-to-date ***information*** relating to the ***structure*** and functions of the organisation is accessed and applied. 2.2 Appropriate persons are identified to ensure correct levels of authority are utilised to deal with responsibilities within the organisation. 2.3 Areas of work where delegations apply are identified and delegation levels within the organisation are confirmed in accordance with organisational procedures/guidelines. 2.4 Approvals are obtained in the workplace in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational delegations.
3. Apply knowledge of protocols	3.1 Up-to-date information relating to government ***protocols*** is identified, accessed and applied. 3.2 Protocols are observed in dealings with other organisations and with persons from within and outside the organisation. 3.3 Written protocols, formats and standards are adhered to in writing government documents.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- 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
- responding to diversity, including gender and disability
- applying workplace safety procedures in the context of work in the public sector

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- 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 such as Treasury, Premiers, Prime Minister and Cabinet
- delegations
- Parliamentary procedures impacting on the organisation (such as petitions, Ministerial statements, Question Time, Questions without Notice, Questions on Notice)
- Parliamentary process and how it affects operational objectives and timeframes

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- 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
- equal employment opportunity, equity and diversity principles

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPGOV402B Deliver and monitor service to clients
  - PSPGOV403B Use resources to achieve work unit goals
  - PSPGOV404B Develop and implement work unit plans
  - PSPGOV405B Provide input to change processes
  - PSPGOV406B Gather and analyse information
  - PSPGOV407B Provide a quotation
  - PSPGOV409A Provide support to Parliament
  - PSPPROC410A Administer contracts
  - PSPREG410B Give evidence
  - PSPREG411A Gather information through interviews

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of government processes in a range of (3 or more) contexts (or occasions, over time) in generalist or specialist work activities such as delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, administering contracts, etc

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to the

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public sector
- organisational structures
- Machinery of Government information
- case studies and workplace scenarios to capture the range of situations likely to be encountered when applying government processes

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when applying government processes, including coping with difficulties, irregularities and breakdowns in routine
- applying government processes in a range of (3 or more) contexts (or occasions, over time) in contexts relating to generalist or specialist work activities such delivering and monitoring services to clients, using resources, conducting interviews, giving evidence, administering contracts, etc.

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.	
Machinery of Government may include:	• cycles of government, such as budget cycle • separation of powers (Executive, Judiciary, Legislative) • levels of government (Federal, State/Territory, Local) • legislative process • role and functions of parliamentary structures (unicameral, bicameral) • Cabinet • Ministers • Ministerial portfolios • structure and functions of government departments • quasi-government organisations

Information may include:	• documents
	• databases
	• web sites
	• oral information from:
	  • managers
	  • supervisors
	  • colleagues

Organisational structures may include:	• bureaucratic structure and hierarchy • key personnel and their roles • key organisational functions and accountabilities

Protocols may include:	• forms of address
	• who may be addressed directly
	• written protocols/formats for written materials
	• restrictions relating to contact with:
	  • Minister's office
	  • media
	  • members of the public/specific interest groups
	  • Members of Parliament
	  • other government departments
	  • senior management/Board members
	  • government and opposition parties

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Unit Sector(s)

Not applicable.

Competency field

Working in Government.

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PSPGOV507A Undertake negotiations

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers negotiations as an individual or as a member of a negotiating team. It includes planning for the negotiation, conducting the negotiation and finalising the outcome.

In practice, negotiations may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, providing leadership, undertaking research and analysis, initiating projects, performing quasi-judicial functions, etc.

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan for negotiation	1.1 The ***purpose of the negotiation*** and the issue/s under consideration are clarified with affected personnel and through analysis of all related documentation/information.
	1.2 Primary needs and desired outcomes of all parties are identified.
	1.3 The organisation's position is determined in consultation with senior personnel, and a ***negotiating approach*** is devised based on an analysis of the strengths and weaknesses of the position.
	1.4 ***Information relating to the negotiation***, including any precedents, is collected, analysed and organised to support the negotiating approach.
	1.5 Timeframe and logistics are agreed and a ***negotiation plan*** is developed in accordance with legislation, policy and procedures, and communicated to other staff, if any, involved in the negotiation team.
2. Conduct negotiation	2.1 The issue/s under consideration and the negotiation process to be used are agreed by all parties and documented in accordance with legislation, policy and procedures.
	2.2 ***Negotiating techniques*** are used to persuade the other party of the strength of the argument in favour of the organisation's position.
	2.3 The negotiation plan is modified if necessary to respond to ***contingencies***.
	2.4 ***Techniques*** for dealing with conflict or deadlocks are selected and used in accordance with the negotiation plan and the progress of the negotiation.
	2.5 Options for resolving the issue are discussed and the acceptability of these to the parties is determined.
3. Finalise negotiation outcomes	3.1 An agreed conclusion is reached, documented and signed-off by the parties.
	3.2 Negotiation outcomes are reported in accordance with organisational policy and procedures and ***stakeholders*** are

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ELEMENT	PERFORMANCE CRITERIA
	debriefed if required.
	3.3 Any further action required as a result of agreement is determined and undertaken in accordance with organisational requirements.
	3.4 The negotiation process and outcomes are reviewed, and lessons learnt are documented for future use in accordance with organisational recordkeeping practices.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying legislation, regulations and policies relating to negotiating in the public sector
- communicating with diverse stakeholders such as the other party, team members, senior management, including listening, questioning, establishing rapport, responding, etc
- applying decision making and problem solving
- adjusting quickly to new information or unexpected questions and attitudes
- report writing
- responding to diversity, including gender and disability
- applying procedures relating to occupational health and safety and environment in the context of negotiations

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, policies, procedures and guidelines relating to negotiations in the public sector, such as freedom of information, privacy, equal employment opportunity
- sources of organisational information
- delegations and lines of authority
- decision making
- negotiation techniques
- conflict resolution
- recordkeeping requirements for negotiations
- equal employment opportunity, equity and diversity principles

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Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPCRT506A Perform quasi-judicial functions
  - PSPETHC501B Promote the values and ethos of public service
  - PSPGOV504B Undertake research and analysis
  - PSPGOV505A Promote diversity
  - PSPGOV508A Manage conflict
  - PSPGOV511A Provide leadership
  - PSPGOV512A Use complex workplace communication strategies
  - PSPLEGN501B Promote compliance with legislation in the public sector
  - PSPOHS501A Monitor and maintain workplace safety
  - PSPPM501B Design complex projects
  - PSPPROC502A Establish contract management arrangements

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- negotiations undertaken in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to negotiation, including freedom of information, privacy, equal employment opportunity, anti-discrimination, occupational health and safety
- case studies and workplace scenarios to capture the range of negotiation situations likely to be encountered as an individual or as a team member

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Where and how to assess evidence	Valid assessment of this unit requires: • a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when undertaking negotiations, including coping with difficulties, irregularities and breakdowns in routine • negotiations undertaken in a range of (3 or more) contexts (or occasions, over time). Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: • people with disabilities • people from culturally and linguistically diverse backgrounds • Aboriginal and Torres Strait Islander people • women • young people • older people • people in rural and remote locations. Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: • demonstration • observation • portfolios • questioning • scenarios • simulation or role plays • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

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Purpose of negotiation may include:	• required outcomes • other possible outcomes • organisational priorities • consequences of negotiation failing
Negotiating approach may be:	• consultative • collaborative • competitive • confrontational • soft • passive
Information relating to the negotiation may include:	• background to the dispute/issues under consideration • background information on the parties • organisational information • legislative requirements • organisational policy and procedures • material to support bargaining position • precedents
Negotiation plan may include:	• roles and responsibilities of negotiation team members, if any • identification of team leader • timing • logistics • key facts • tactics • personal strengths and weaknesses • techniques to be used for negotiating, breaking deadlocks, dealing with conflict • fallback position • areas where compromise is possible • process management strategies • alternative dispute resolution processes
Negotiation techniques may include:	• speaking skills • presentation techniques • effective listening • questioning techniques • verbal and non-verbal communication • using personal attributes • culturally and linguistically appropriate strategies • constructive feedback • issues identification • exploring options • identifying areas of agreement

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	• recording agreements
Contingencies may include:	• changed circumstances • changed tactics • changed agenda • new information • decision to withdraw
Techniques for breaking deadlocks may include:	• clarifying • restating position • summarising progress • deferring decision • preparing a compromise • using a mediator/third party
Stakeholders may include:	• management • union • colleagues/other staff • clients • public

Unit Sector(s)

Not applicable.

Competency field

Working in Government

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PSPGOV602B Establish and maintain strategic networks

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers establishing, expanding and utilising strategic networks. It includes identifying features of required strategic networks, identifying or establishing network links with key stakeholders and building strategic relationships.

In practice, establishing and maintaining strategic networks may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government systems, managing change, managing diversity, etc.

This unit is one of 3 units of competency in the Working in Government Competency Field that deal with networks. Related units are:

- PSPGOV303B Build and maintain internal networks
- PSPGOV418A Develop internal and external networks

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Identify features of required strategic networks**	1.1 The strategic value and likely outcomes of participating in ***networks*** are identified at an individual and organisational level. 1.2 The benefits of existing networks are researched and assessed. 1.3 ***Key stakeholders*** and their needs, expectations and roles are identified.
2. **Identify or establish network links with key stakeholders**	2.1 Existing network links between key stakeholders are identified, and strategies to maintain or expand them are identified and initiated. 2.2 New network links between self and key internal and external stakeholders are established and used effectively. 2.3 Strong working relationships are developed and maintained among network members.
3. **Build strategic relationships**	3.1 Effective communication channels are established to exchange strategic information for the mutual benefit of network members. 3.2 Interaction and consultation with key stakeholders are used to anticipate developments that may impact on the organisation and require a strategic approach to dealing with them. 3.3 Misunderstandings and conflict situations are identified and constructively addressed in accordance with principles of conflict resolution. 3.4 Opportunities are sought and acted upon to improve communication processes and achieve mutually beneficial outcomes.

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Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying legislation, regulations and policies relating to public sector environment
- using a range of communication methods with diverse strategic networks including consultation, liaison, negotiation, building influence and reputation, transparency
- using formal and informal industry communication channels
- responding to diversity, including gender and disability
- resolving conflict in a strategic networking context
- applying procedures relating to occupational health and safety and environment in the context of strategic networking

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, policies, procedures and guidelines relating to work in a public sector environment
- local/national/international public sector structures/protocols
- industry/professional communication channels and networks
- principles of interpersonal, group and inter-agency communication
- principles of conflict resolution in a strategic context
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of strategic networking

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

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- PSPETHC601B Maintain and enhance confidence in public service
- PSPGOV601B Apply government systems
- PSPGOV605A Persuade and influence opinion
- PSPLEGN601B Manage compliance with legislation in the public sector
- PSPMNGT604B Manage change
- PSPMNGT605B Manage diversity
- PSPMNGT609B Formulate business strategies
- PSPMNGT613A Develop partnering arrangements

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- strategic networks established/maintained in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to the public sector environment
- organisational charts
- case studies and workplace scenarios to capture the range of situations likely to be encountered when establishing and maintaining strategic networks

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment, or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when establishing and maintaining strategic networks, including coping with difficulties, irregularities and breakdowns in routine
- strategic networks established/maintained in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

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	Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: • case studies • portfolios • projects • questioning • scenarios • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Networks may include:	• formal or informal networks • circulation lists • e-networks • bulletin boards • virtual communities • mailing lists
Key stakeholders may include:	• officers from other government organisations • Ministerial advisers • community members • council members • industry representatives • professional associations • international public sector staff • international associations

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Unit Sector(s)

Not applicable.

Competency field

Working in Government.

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PSPLEGN301B Comply with legislation in the public sector

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers compliance with legislation and related public sector policy guidelines and procedures. It includes identifying and complying with legislative requirements and reporting incidents of non-compliance.

In practice, complying with legislation is demonstrated in the context of other generalist or specialist work activities such as delivering client services, using financial resources, procuring goods or services

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify legislative requirements	1.1 Information is accessed that covers the range of ***legislation and guidelines*** relating to the workplace and is current and comprehensive. 1.2 Key requirements of relevant pieces of legislation are identified and confirmed with senior staff. 1.3 Requirements of legislation are clarified to confirm understanding and ensure consistency of interpretation and application. 1.4 Clarification is obtained of the way various pieces of legislation are integrated to provide a legislative framework for public sector work. 1.5 Advice is obtained when apparently ***conflicting legislative directives*** are found.
2. Comply with legislative requirements	2.1 Work practices are carried out in accordance with the requirements of legislation relating to the work environment. 2.2 Own conduct is reviewed and feedback from others is used to confirm continuing compliance with legislative requirements.
3. Report incidents of non-compliance	3.1 Possible breaches of legislation are raised promptly with an authorised person/body in accordance with organisational procedures. 3.2 ***Inadequacies in workplace procedures*** which may contribute to non-compliance are raised in accordance with organisational procedures.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for

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this unit.

Skill requirements

Look for evidence that confirms skills in:

- undertaking research and evaluation
- undertaking self-assessment
- reading complex and formal documents such as legislation and related materials to apply them to work practices and to identify inappropriate conduct
- communicating with others involving exchanges of complex oral and written information
- using technology to access legislative requirements
- responding to diversity, including gender and disability
- applying environmental and occupational health and safety procedures

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- the range of legislation relating to the public sector (including occupational health and safety and environment) and the key requirements of each
- public sector codes of ethics/conduct
- equal employment opportunity, equity and diversity principles
- organisational processes/procedures for responding to legislative issues

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPETHC301B Uphold the values and principles of public service
  - PSPGOV305B Access and use resources and financial systems
  - PSPGOV307B Organise workplace information
  - PSPIM301A Process claims

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- PSPPROC302A Undertake basic procurement
- PSPSEC301A Secure government assets

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- compliance with legislation in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- public sector legislation, regulations and guidelines
- procedures and protocols
- scenarios and case studies to capture the range of situations likely to be encountered when complying with public sector legislation

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when complying with legislation in the public sector, including coping with difficulties, irregularities and apparently conflicting legislative requirements
- compliance with legislation in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- questioning

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- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Legislation and guidelines may relate to:

- public sector standards:
  - codes of conduct/ethics
  - guarantee of service
  - legislated standards
  - State/Territory/Commonwealth/organisational standards
  - technical/industrial standards
  - professional standards
  - industry competency standards
  - anti-corruption legislation
  - whistleblowers' protection
- public sector employment:
  - employee relations
  - chief executive officer's instructions
  - Commissioner's instructions
  - public sector notices
- workplace environment:
  - equal employment opportunity
  - affirmative action
  - workplace diversity
  - anti-discrimination
  - workplace harassment
  - occupational health and safety
  - duty of care

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- security, storage, handling and classification of documents
- financial management and accountability:
  - Treasurer's instructions
  - contractual obligations
- transparency:
  - freedom of information
  - professional reporting
  - accountability
  - fair trading
- business and community:
  - privacy
  - trade practices
  - competition
  - road transport legislation
- information and records management standards and legislation
- the organisation's enabling legislation, regulations
- aspects of common law, criminal law, contract law, employment law and administrative law, including judges' rules
- international legislation/codes of behaviour

Conflicting legislative directives may include:

- apparent contradiction between statutes
- apparent conflict between statutes and policy requirements

Inadequacies in workplace procedures may include:

- insufficient financial/other controls
- insecure Internet/fax access
- non-auditable records processes
- ambiguous guidelines
- no guidelines
- unnecessary complexity
- use of non-current legislation

Unit Sector(s)

Not applicable.

Competency field

Legislation and Compliance.

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PSPMNGT607B Develop a business case

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers market analysis, development and costing of options, and justification for a recommended business solution. It includes researching a business case, examining business solutions, and constructing and finalising a business case.

In practice, developing a business case may overlap with other generalist or specialist public sector workplace activities such as applying government systems, complying with legislation, acting ethically, formulating business strategies, managing risk etc.

This unit is one of 3 related to quoting/tendering for business. Related units are:

- PSPGOV407B Provide a quotation
- PSPGOV603B Develop a tender submission response

This unit replaces and is equivalent to *PSPMNGT607A Develop a business case*.

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Research a business case**	1.1 Business problem is identified and confirmed in accordance with organisational policy and procedures. 1.2 Analysis of key ***stakeholder*** requirements is used to clarify objectives. 1.3 A range of ***factors*** is considered through research to identify opportunities and constraints. 1.4 ***Market analysis*** is conducted in accordance with ***legislation, policy and procedures***.
2. **Examine business solutions**	2.1 Business and technical impacts and ***risks*** are analysed through research and consultation and documented in accordance with organisational requirements. 2.2 Community, environmental and human resource impacts are analysed. 2.3 Alternative solutions and their financial implications are canvassed and discussed with senior management and business case originator.
3. **Construct a business case**	3.1 Options are developed and impacts, risks, costs and stakeholders are determined and documented. 3.2 Recommendation is made and justified. 3.3 Business case is prepared in accordance with organisational requirements.
4. **Finalise a business case**	4.1 Business case is presented and recommendations are explained in a manner suited to the audience. 4.2 Approvals and management endorsement are obtained in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational policy and procedures.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- consulting with others
- managing financial/other resources
- using language and style suited to written submissions
- using technical and other vocabulary
- using a variety of words and language structures to explain 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
- responding to diversity, including gender and disability

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- 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
- equal employment opportunity, equity and diversity principles
- jurisdictional legislation that applies to business case development including occupational health and safety and environmental requirements

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of

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competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*
- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:
  - PSPETHC601B Maintain and enhance confidence in public service
  - PSPGOV601B Apply government systems
  - PSPGOV602B Establish and maintain strategic networks
  - PSPLEGN601B Manage compliance with legislation in the public sector
  - PSPPOL603A Manage policy implementation

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework)
- business case development in a range of (2 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, procedures and protocols related to developing a business case
- workplace scenarios and case studies to capture the range of situations likely to be encountered when developing a business case
- guidelines for constructing business cases in the public sector

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when developing a business case, including coping with difficulties, irregularities and breakdowns in routine
- business case development in a range of (2 or more) contexts (or occasions, over time)

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Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- demonstration
- portfolios
- projects
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Stakeholders may include:

- all those individuals and groups both inside and outside the organisation that have some direct interest in the organisation's behaviour, actions, products and services such as:
  - employees at all levels of the organisation

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- other public sector organisations
- union and association representatives
- boards of management
- government
- Ministers
- clients

Factors to be considered in research phase may include:

- required outcomes
- government policy and direction
- links to organisational goals and objectives
- market capabilities
- needs analysis
- background and current situation
- funding availability
- timing
- interdependency with other activities
- constraints
- cost-benefit ratio
- consultative processes
- ownership/sponsorship

Market analysis may include:

- structure of and 'players' in the market
- market capability
- market maturity
- market strength
- factors/conditions which may affect supply
- potential impact of intended activity
- environmental issues

Legislation, policy and procedures may include:

- Commonwealth and State/Territory legislation including equal employment opportunity and anti-discrimination law
- national and international codes of practice and standards
- the organisation's policies and practices
- government policy
- codes of conduct
- national competition policy

Risk analysis may include:

- financial matters
- people
- assets and physical environment
- reputation and image
- legal issues
- business continuity

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- political impact
- community interest

Unit Sector(s)

Not applicable.

Competency field

Management.

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PSPPOL404A Support policy implementation

Modification History

Release	TP Version	Comments
3	PSP12V1	Unit descriptor edited.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the identification and application of policy in a public sector work environment. It includes identifying relevant policy, implementing policy, and monitoring and reporting on policy implementation.

In practice, supporting policy implementation occurs in the context of other generalist or specialist work activities such as delivering client services, providing input to change, implementing workplace safety procedures, awarding contracts.

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

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify relevant policy	1.1 ***Work situations*** that are shaped by government or organisation policy are identified in accordance with public sector guidelines. 1.2 ***Policy*** relating to particular work situations is identified and located.
2. Implement policy	2.1 Policy to be implemented is interpreted under direction to identify and plan for change in work practices. 2.2 The implications of policy for individual work practices are identified, and practices are confirmed/adjusted to reflect policy requirements in accordance with organisational procedures. 2.3 Others affected by policy requirements are supported to accommodate those requirements. 2.4 Policy is implemented to support achievement of outcomes intended in specific work areas.
3. Monitor and report on policy implementation	3.1 Information that will assist with the evaluation of the effectiveness of policy implementation is gathered, recorded and reported under direction in accordance with organisational procedures. 3.2 ***Information*** that will assist with the evaluation of the impact of policy implementation on organisational outcomes is gathered, recorded and reported under direction in accordance with organisational procedures.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for

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this unit.

Skill requirements

Look for evidence that confirms skills in:

- reading complex and formal documents such as policy and legislation and providing information on their application
- researching and providing information
- preparing written reports requiring accuracy of expression and language and structures suited to the intended audience
- working with legislation drafters and legal advisers
- writing guidelines in plain English
- working as a member of a team to consult on and prepare policy guidelines
- adjusting communication to suit different audiences
- responding to diversity, including gender and disability
- gathering and analysing policy feedback
- accessing policies and legislation electronically or in hard copy
- identifying and addressing the environmental and occupational health and safety implications of policy/s being implemented

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- practices and procedures for developing policy guidelines
- policy feedback mechanisms
- current organisation policies
- whole of government policies and international policy obligations that impact on organisation policy
- organisation and government procedures and protocols
- public sector code/s of ethics and code/s of conduct
- equal employment opportunity, equity and diversity principles
- environmental and occupational health and safety implications of policy/s being implemented

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed

- *Pre-requisite* units that must be achieved prior to this unit:*Nil*

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together

- *Co-requisite* units that must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to, public sector generalist and specialist units in the Certificate IV in Government.

Choice from the following is recommended:

- PSPGOV402B Deliver and monitor service to clients
- PSPGOV403B Use resources to achieve work unit goals
- PSPGOV408A Value diversity
- PSPGOV422A Apply government processes
- PSPREG407B Produce formal record of interview
- PSPREG410B Give evidence
- PSPPROC409A Receive and select offers

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework)
- policy implementation supported in a range of (2 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- relevant policy and legislation
- public sector standards, procedures and protocols
- policy guidelines

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when supporting policy implementation, including coping with difficulties, irregularities and breakdowns in routine
- policy implementation supported in a range of (2 or more) contexts (or occasions, over time)

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds

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- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in ***bold italics*** in the Performance Criteria is explained here.

Work situations may include:

- processes
- outcomes
- priorities
- client services
- core business
- service delivery mode/s
- organisational structure

Policy may include:

- government policy
- organisation policy

Information for evaluation may include:

- statistical data
- qualitative data

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- anecdotal feedback
- survey data
- stakeholder opinions

Unit Sector(s)

Not applicable.

Competency field

Policy.

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PSPPROC406B Procure goods and services

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the expenditure of public monies for simple procurement of low value/low risk goods and services using contractual arrangements that include simple tendering and requests for quotation. The unit requires analysis and decision making in the procurement process, which is undertaken under limited supervision. It includes planning and undertaking procurement, managing contractors and completing contractual arrangements.

In practice, procuring goods and services overlaps with other generalist and specialist public sector or local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, developing and distributing requests for offers, selecting providers and managing contracts.

This unit is not recommended for those who specialise in procurement. It cannot be included in the Certificate IV in Government (Procurement and Contracting).

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

Application of the Unit

This unit applies to those who enter into contracts or go out to tender or manage the procurement but are not procurement professionals. Those undertaking this unit may be developing a request for tender but procurement is not a major part of their role.

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Licensing/Regulatory Information

Not applicable.

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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan for procurement of goods or services.	1.1. ***Market assessment*** is used to identify and select options for procuring goods or services in accordance with business plan requirements, legislation, policy and procedures, and ***probity requirements***. 1.2. ***Commercial strategy*** is identified to achieve the procurement outcome set out in the business plan, achieve value for money, and meet legal and probity requirements. 1.3. Risk planning is conducted for the procurement activity according to procedures, delegations and guidelines. 1.4. Process and criteria for evaluation of offers from suppliers or service providers are identified to meet public sector probity requirements, and are recorded in a tender evaluation plan. 1.5. Procurement plan is developed to manage procurement process and ***contractual arrangements*** in accordance with ***legislation***, ***policy and procedures***, ***and probity requirements***.

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	1.6. ***Stakeholders*** are consulted about the planned procurement and their feedback is incorporated into the procurement process.
2. Undertake procurement.	2.1. ***Method for requesting and receiving offers*** is chosen to suit the procurement activity and comply with organisational policy and procedures and probity requirements. 2.2. Specialist expertise is used to assist in evaluation of offers as required. 2.3. Evaluation and selection of the offer are made according to tender evaluation plan, and organisational policy and procedures. 2.4. Notification of successful and unsuccessful suppliers/providers is undertaken according to procurement plan, and organisational policy and procedures. 2.5. Work does not commence and payment is not made until contractual arrangements are formalised. 2.6. Contractual arrangements that are legally binding to all parties and suitable to the procurement activity are negotiated, formalised and ***reported*** according to organisational policy and procedures.
3. Manage contractors.	3.1. Communication strategies are established to build and maintain relationships with contractors. 3.2. Performance is monitored against contract performance indicators for quality assurance of the goods or services and to ensure compliance with contract specifications. 3.3. Contract performance indicators are regularly reviewed to ensure relevance. 3.4. Approvals are obtained for contract variations according to organisational and contractual requirements. 3.5. Disputes or complaints are investigated, documented and resolved or referred according to contractual provisions. 3.6. Contractual obligations to contractors are met. 3.7. ***Records*** are maintained according to organisational and legal requirements to provide an audit trail and for other ***organisational purposes***.
4. Complete contractual arrangements.	4.1. Goods and services received are confirmed as meeting contractual specification and required outcome, and accounts are processed for payment according to organisational procedures.

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4.2. Contracts are finalised, cancelled or terminated according to contractual arrangements.

4.3. Contract performance, outcomes and management processes are evaluated, and lessons learnt are recorded and used to inform ongoing contract management practices.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - write procurement specifications in unambiguous terms
  - consult and negotiate with providers
  - write, read and/or sign contractual agreements that may include complexity of language and style, using templates where appropriate
  - engage in ongoing communication with contractors that may involve explaining or clarifying written and oral information, note-taking at meetings, active listening, and checking for understanding
  - provide feedback
- teamwork skills to:
  - work independently or under direction as appropriate to the situation
  - model team leadership approaches if appropriate
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to:
  - evaluate procurement options and select the most suitable option
  - assess goods or services provided against specifications
- initiative and enterprise skills to apply OHS, environmental, sustainability and corporate social responsibility practices in the context of government procurement activities
- planning and organising skills to:
  - manage contractor performance against contract requirements
  - make payments and manage financial arrangements
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
- technology skills to:
  - operate organisational IT systems
  - use electronic procurement templates

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Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  - relating to contract management, including environmental purchasing and corporate social responsibility guidance
  - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- organisation's code of conduct and code of ethics
- procurement options and methods
- probity and ethical issues
- codes of conduct, codes of practice and standards of individual behaviour relating to procuring goods and services, in particular identifying and managing conflict of interest, gifts and inappropriate relationships with providers
- procedures for receipt and payment of goods or services
- common use arrangements
- procurement approval procedures
- financial accountability requirements
- aspects of contract law, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts

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	Competency must be demonstrated in the ability to procure goods and services consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • plan a procurement activity, using templates where these are available, to a level of detail commensurate with the complexity and risk profile of the procurement • implement the procurement plan in a way that reflects the legislative and policy environment applicable to the organisation • develop a suitable contract management plan, using templates if available • manage the performance of contractors to ensure that the

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goods or services are delivered in accordance with the contract
- act within own delegations and refer issues to higher authority when necessary.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to procuring goods and services
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities
- case studies that incorporate dilemmas, and probity requirements relating to procurement of goods and services.

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies selected for procurement
- review of procurement plans, requests for quotation/tender, tender evaluation plans, selection reports, contracts, contract management plans and reports, and other documentation prepared by the candidate in a range of contexts
- feedback from peers or supervisors on actions taken to monitor and review contract performance.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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- PSPETHC401A Uphold and support the values and principles of public service
- PSPGOV417A Identify and treat risks
- PSPGOV421A Exercise delegations
- PSPLEGN401A Encourage compliance with legislation in the public sector
- PSPPROC411A Plan procurement
- PSPPROC412A Develop and distribute requests for offers
- PSPPROC413A Select providers and develop contracts
- PSPPROC414A Manage contracts.

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.

Market assessment may include:	• structure of the market • number and quality of providers • factors and conditions which may affect supply of goods or provision of services • potential impact of intended procurement activity
Evaluation of options may include:	• stakeholder consultation • confirmation that procurement is necessary • development of a business case • comparison of internal and outsourced provision

Probity requirements:	• may include:
	  • accountability
	  • transparency
	  • confidentiality
	  • managing conflict of interest
	  • impartiality
	• are maintained to:
	  • encourage conformity to processes
	  • facilitate accountability
	  • ensure proponents are treated in a fair and equitable manner

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	• encourage commercial completion • preserve public and private sector confidence in government processes
Key elements of a ***commercial strategy*** may include:	• consultation with key stakeholders • expenditure budget meets organisational requirements for probity and accountability • procurement process agreed by users and documented, and meets legal and probity requirements • approvals obtained • contractual arrangements that capture and address identified risks, protection of all parties, and include performance indicators that provide the basis for due performance
Contractual arrangements may include:	• verbal and written orders • purchase order • government credit cards • petty cash • memoranda of understanding/memoranda of agreement • in-house service level agreements • contracts • standing offers • inter and intra-government agreements
Legislation, ***policy and procedures and probity requirements*** may include:	• commonwealth or state and territory legislation • council rules and by-laws • equal employment opportunity and anti-discrimination law • commonwealth, and state or territory government procurement guidelines, including environmental purchasing guidelines • organisational policies and practices • probity guidelines • financial management requirements
Stakeholders may include:	• end users, customers or clients, and sponsors • current or potential providers or suppliers • technical or functional experts or advisers • commonwealth, state or territory, and local government • the organisation • other public sector organisations • employees, unions and staff associations

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- industry bodies
- local communities
- lobby groups and special user groups

Methods for requesting and receiving offers may include:

- requests for quotation
- direct purchases using existing supply agreements, such as standing offers
- oral quotations
- written quotations
- direct purchases from retail or wholesale outlets
- electronic commerce

Reporting may include:

- gazettal notices
- public notification
- Gazette Publishing System (GaPS)
- electronic
- verbal
- annual reports
- internal and/or external
- statistical reports

Records may include:

- purchase requests and orders
- simple procurement submissions and proposals
- invoices and payment requests
- statements and petty cash vouchers
- offer and contract documents
- evaluation process documentation
- records of authorised decisions
- corporate credit card transaction statements
- records of supplier performance
- gazettal notices
- financial statements
- asset registers
- records of conversation
- actions taken to manage identified conflict of interest

Organisational purposes may include:

- reports and other documents
- future procurement planning and contract management
- accountability requirements
- Ministerials

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Unit Sector(s)

Not applicable

Competency field

Procurement and Contract Management.

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PSPPROC411A Plan procurement

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the ability to plan, justify and approve of procurement requirements to achieve the required outcome. It includes defining and justifying the need, researching potential impact and risks, and securing organisational support to proceed with procurement activity.

In practice, planning procurement overlaps with other generalist and specialist public sector and local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, developing and distributing requests for offers, selecting providers and managing contracts.

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

Application of the Unit

The unit applies to those who plan for procurement, including those who specialise in procurement.

Licensing/Regulatory Information

Not applicable.

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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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Interpret procurement requirements	1.1. Consultation is undertaken with ***stakeholders*** to determine whether viable alternatives to procurement exist that address identified business need, to define and clarify requirements, and to justify the procurement decision. 1.2. Scoping of procurement requirements is conducted identifying outcomes, objectives and logistics/supply chain factors. 1.3. ***Market analysis*** is conducted to identify factors that may impact on procurement decisions. 1.4. ***Procurement approvals and appropriations*** are confirmed for whole-of-life of the activity. 1.5. ***Information on sources of supply*** is accessed to determine possible providers and any conflict of interest is identified and resolved. 1.6. Planned provider contract arrangements are specified in accordance with ***legislation***, ***policy and probity requirements***. 1.7. ***Issues and opportunities*** are investigated for integration into procurement activity.
2. Plan procurement activities	2.1. Procurement requirement that meets legislative, policy and probity requirements is outlined from transition to close-out.

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	2.2. Opportunities to obtain stakeholder input at all stages of the procurement process are actively planned. 2.3. ***Resource requirements*** are confirmed and committed in a timely manner and responsible authorities are nominated. 2.4. Strategies for briefing potential bidders are included when required, are practical and meet probity requirements of fairness and impartiality, public sector standards and organisational protocols. 2.5. Consideration is given to environmental and sustainability practices along with corporate social responsibility practices at all stages of the procurement process.
3. Develop procurement plans	3.1. ***Procurement approval documentation*** and ***procurement plan*** are developed and approved which contain relevant detail about the procurement process and desired business outcomes, according to organisational policy and public sector standards. 3.2. ***Stakeholder input is sought at all stages during the development of the procurement plan***. 3.3. ***Probity risks*** in the procurement process are expressly considered during the development of the procurement plan. 3.4. Approved procurement plan or strategy is communicated to stakeholders.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult with stakeholders, involving complex oral and written exchanges of information
  - write a procurement requirement, which may require complex style and language expressed in unambiguous terms
  - provide feedback
- teamwork skills to:
  - work independently or under direction as appropriate to the situation
  - model team leadership approaches if appropriate
  - respond to diversity

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    - refer issues to the correct person
- problem-solving skills to:
    - undertake analysis of issues relating to procurement need
    - make comparisons, justify a point of view and provide supporting evidence
- initiative and enterprise skills to apply OHS, environmental, sustainability and corporate social responsibility practices in the context of developing requests for offers
- planning and organising skills to:
    - research issues relating to procurement need
    - plan issues relating to procurement need
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
- technology skills to:
    - operate organisational IT systems
    - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
    - relating to contract management, including environmental purchasing and corporate social responsibility guidance
    - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement
- life cycle costs
- whole-of-life considerations
- technical knowledge or subject matter expertise in the goods or services being procured
- 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

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 Competency must be demonstrated in the ability to plan

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procurement consistently in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to:

- consult with a wide range of stakeholders in order to identify, confirm and clarify procurement requirements
- undertake market research
- develop business case, using templates if available
- develop a procurement plan, using templates if available
- act within own delegations and refer issues to higher authority when necessary.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to procuring goods and services
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities
- case studies that incorporate dilemmas, and probity requirements relating to planning procurement of goods and services.

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies selected for procurement planning
- review of business cases, budgets, procurement plans, risk assessments, procurement approvals and other documentation prepared or obtained by the candidate in a range of contexts
- review of stakeholder engagement approaches adopted by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the

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candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC401A Uphold and support the values and principles of public service
- PSPGOV417A Identify and treat risks
- PSPGOV421A Exercise delegations
- PSPLEGN401A Encourage compliance with legislation in the public sector
- PSPPROC412A Develop and distribute requests for offers
- PSPPROC413A Select providers and develop contracts.

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.

Stakeholders may include:

- end users, customers or clients, and sponsors
- current or potential providers or suppliers
- technical or functional experts or advisers
- commonwealth, state or territory, and local government
- the organisation
- other public sector organisations
- employees, unions and staff associations
- industry bodies
- local communities
- lobby groups and special user groups
- experts, including financial, legal, technical, commercial and probity.

Market analysis may include:

- structure of market
- 'players' in the market
- market capability

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- market maturity
- market strength
- factors or conditions that may affect supply
- supplier positioning and referencing
- supplier viability analysis
- potential impact of intended contracting activity.

Procurement approvals and appropriations may require:

- ministerial authorisation
- compliance with instructions or finance circulars
- CEO or board authorisation
- confirmation by chief financial officer
- delegate approval
- budget approval
- business case approval
- special consideration if they concern:
  - long-term travel deals
  - long-term computer deals
  - long-term lease deals
  - issuing indemnities.

Information on sources of supply may include:

- Yellow Pages
- buyers guides, supplier brochures and advertisements
- purchasing contract awareness service
- suppliers' previous histories and files
- peer, supplier and customer networks
- computer-aided purchase of computers
- newspapers, journals, bulletins or directories
- government gazettal notices
- internet.

Legislation, ***policy and probity requirements*** may include:

- commonwealth or state and territory legislation
- equal employment opportunity and anti-discrimination law
- commonwealth, and state or territory government procurement guidelines
- organisational policies and practices
- probity guidelines
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement
- security and confidentiality
- risk management
- environmental, sustainability and corporate social responsibility principles.

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Issues and opportunities may include:	• risk sharing • cost sharing • cost escalation • intellectual property rights • knowledge management • corporate knowledge • libraries and archives • capital equipment and asset ownership • value engineering • value management • innovation • continuous improvement • future organisational requirements • quality • whole-of-life considerations • organisational integration and cooperation.
Resource requirements may include:	• facilities • information technology • personnel • budget support equipment • use of contractor staff • professional service providers • risk assessment.
Procurement approval documentation may include:	• business case • justifications • delegate submissions.
Procurement plan may include:	• formal documented procurement plan, either using an organisational template or not using a template • procurement strategy • acquisition strategy • leasing strategy.
Probity risks may include:	• corruption • fraud • conflict of interest (actual, perceived or potential) • unfair treatment of providers or potential providers • misuse of resources • misuse of information • manipulation of the marketplace.

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Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PSPPROC412A Develop and distribute requests for offers

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the competencies required to develop and disseminate a request for offers to fulfil procurement requirements. It includes specifying the requirement, developing the formal request for offer documents and developing the offer evaluation plan.

In practice, developing and distributing requests for offers overlaps with other generalist and specialist public sector and local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, selecting providers and managing contracts.

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

Application of the Unit

The unit applies to those who plan, prepare and develop formal requests for offers, including those who specialise in procurement.

Licensing/Regulatory Information

Not applicable.

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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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Specify procurement requirement.	1.1. Scoping of requirement is undertaken to identify outcomes, objectives and ***practical requirements***. 1.2. Statement of requirement is prepared that meets organisational requirements for format and content and is acceptable to ***stakeholders***. 1.3. Needs of clients, end users and other stakeholders are considered and incorporated into statement of requirement. 1.4. Procurement outcome is fair to, and achievable by, potential providers. 1.5. Planned provider contract arrangements are specified according to policy and guidelines. 1.6. ***Standards of performance*** and ***codes of practice***, incentives, disincentives and performance measures are specified.
2. Develop request for offers.	2.1. ***Request for offers*** and contractual conditions suitable for procurement activity are developed and clarified with clients, providers and/or experts as necessary. 2.2. Contractual conditions suitable for procurement activity are developed and clarified with clients, providers and/or experts as necessary. 2.3. When possible and appropriate, ***input*** on content of

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request for offer documents and proposed contractual conditions is obtained from market according to probity requirement of impartiality.

2.4. Approvals to approach marketplace are obtained according to organisational policy and procedures.

2.5. Records relating to documenting request, and seeking, processing and closing ***offers***, are maintained according to organisational procedures and legal requirements.

3. Develop offer evaluation plan.

3.1. ***Offer evaluation plan***, including ***criteria for evaluation***, is developed, documented and approved prior to releasing formal request documentation to the market.

3.2. Where used, ***specialist expertise*** is arranged to evaluate offers and the structure and membership of evaluation panel.

3.3. Offer evaluation plan complies with ***probity requirements***, in particular impartiality and management of conflict of interest.

4. Manage distribution and receipt of offers.

4.1. Request for offers is disseminated according to organisational procedures and guidelines, and public sector standards.

4.2. Briefings and clarification of information in the request for offer are undertaken as required according to procurement plan, organisational procedures and guidelines, public sector standards and probity requirements of fairness and impartiality.

4.3. ***Offers are received*** according to organisational procedures and guidelines, and public sector standards.

4.4. Requests for offers and closing offers are disseminated in line with ***probity issues***.

4.5. Late offers and non-conforming bids are dealt with according to procurement plan and request for offer documentation.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult with stakeholders, specialists and providers involving complex oral

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and written exchanges of information
    - read complex documents, such as contracts, legislation and guidelines
    - write requests for offers, which may include complex style and language expressed in unambiguous terms
    - provide feedback
- teamwork skills to:
    - work independently or under direction as appropriate to the situation
    - model team leadership approaches if appropriate
    - respond to diversity
    - refer issues to the correct person
- problem-solving skills to:
    - apply probity requirements in specifying and developing requests for offers, providing briefings and information, and receiving offers
    - apply OHS requirements (where safety or security may be an issue) when developing requests for offers
- initiative and enterprise skills to:
    - apply the content of complex documents, such as contracts, legislation and guidelines
    - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of developing requests for offers
- planning and organising skills to manage the release of documents to stakeholders
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
- technology skills to:
    - operate organisational IT systems
    - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
    - relating to requests for offers, including environmental purchasing and corporate social responsibility guidance
    - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to developing and receiving requests for offers
- issues to be considered when developing requests for offers, including things like buying locally, and open or restricted opportunities to tender
- aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to requests for offers

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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

Competency must be demonstrated in the development and distribution of requests for offers; performed consistently and in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to:

- consult with stakeholders to develop a specification suited to the particular procurement being completed
- develop request for offer documentation, using templates where available
- develop offer evaluation plans with suitable evaluation criteria and evaluation process, using templates where available
- manage the release of requests for offers to industry
- manage the receipt of responses from industry
- apply probity principles relevant to this stage of the procurement process

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to procurement of goods and services
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities associated with developing and distributing requests for offers
- case studies that incorporate dilemmas, and probity requirements relating to developing and distributing requests for offers

Method of assessment

The following assessment methods are suggested:

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- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for developing and distributing requests for offers
- review of requests for offers (including specifications), offer evaluation plans, industry briefs, risk assessments and other documentation prepared by the candidate in a range of contexts
- review of stakeholder engagement strategies used by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC401A Uphold and support the values and principles of public service
- PSPGOV417A Identify and treat risks
- PSPGOV421A Exercise delegations
- PSPLEGN401A Encourage compliance with legislation in the public sector
- PSPPROC411A Plan procurement
- PSPPROC413A Select providers and develop contracts
- PSPPROC414A Manage contracts.

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.

Practical requirements may include:

- phases or stages of the procurement activity
- timeframes

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- expertise needed
- facilities needed
- software and other tools needed

Stakeholders may include:

- end users, customers or clients, and sponsors
- current or potential providers or suppliers
- technical or functional experts or advisers
- commonwealth, state or territory, and local government
- the organisation
- other public sector organisations
- employees, unions and staff associations
- industry bodies
- local communities
- lobby groups and special user groups

Standards of performance and ***codes of practice*** may include:

- value for money
- quality measures
- benchmarks
- milestones and timeframes
- performance indicators
- codes of practice and standards of behaviour

Requests for offers may include invitations to submit:

- tenders
- proposals
- quotations
- expressions of interest

Input may be obtained through:

- exposure of draft request for offer
- request for information
- industry comment process

Offers may include:

- tenders
- written quotations
- proposals
- expressions of interest

Offer evaluation plan should:

- be consistent with public sector and organisational legislation, policy and guidelines, such as:
  - commonwealth or state and territory legislation, including:
  - equal employment opportunity and anti-discrimination
  - risk management
  - security and confidentiality

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- council rules and by-laws
- commonwealth, and state or territory government procurement guidelines, including environmental purchasing, access and equity, social justice guidelines
- organisational policies and practices
- environmental, sustainability and corporate social responsibility principles

- include practical and measurable criteria for selecting the provider and explanation of process that will be used to make selection

Criteria for evaluation may include:

- value for money
- demonstrated capacity to deliver outcomes
- available expertise
- project management expertise to deliver the outcomes on time and within budget
- meeting specific policy requirements, such as buying locally and environmental sustainability
- innovation

Specialist expertise may include:

- financial
- legal
- technical and user representatives
- commercial
- probity
- logistics

Probity requirements:

- may include:
  - accountability
  - transparency
  - confidentiality
  - managing conflict of interest
  - impartiality
- are maintained to:
  - ensure conformity to processes
  - facilitate accountability
  - ensure proponents are treated in a fair and equitable manner
  - encourage commercial completion
  - preserve public and private sector confidence in government processes

Offers are received:

- using a variety of forms, including:
  - traditional paper-based tender responses

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- computer disk
- electronic, such as internet, email, facsimile, and electronic tendering system

- by a variety of delivery methods, including:
  - post
  - courier
  - by hand
  - electronic lodgement

Probity issues may include:

- equity of access to tender documents
- fairness in provision of information
- decisions about when to accept or reject late tenders
- inappropriate assistance to prepare a tender
- conflict of interest.

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PSPPROC413A Select providers and develop contracts

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the ability to select preferred providers as a result of a formal request for offer process. It includes evaluating offers, selecting preferred providers, obtaining approvals, developing and formalising contractual arrangements, and debriefing the market and other stakeholders.

In practice, selecting providers overlaps with other generalist and specialist public sector and local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, developing and distributing requests for offers and managing contracts.

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

Application of the Unit

The unit applies to those who undertake the selection of providers, including those who specialise in procurement.

Licensing/Regulatory Information

Not applicable.

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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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select preferred providers	1.1. Evaluation panel is formed and coordinated. 1.2. ***Offers*** are ***evaluated*** according to evaluation plan and organisational ***probity requirements*** which relate to managing conflicts of interest and adherence to public sector standards. 1.3. Specialist expertise is obtained where necessary to assist with evaluation of offers. 1.4. Clarification and negotiation of matters contained in offers are undertaken with bidders according to organisational guidelines and public sector standards. 1.5. Preferred providers are selected and recommendations for ***allocation of business*** are developed, justified and documented against selection criteria according to policy, procedures and governance requirements. 1.6. Approvals are obtained for the recommended offers. 1.7. Successful providers are notified in line with organisational protocols.
2. Develop and formalise contractual arrangements	2.1. Approvals are obtained to enter negotiations, when required, and negotiation of the final wording of ***contract*** is conducted according to organisational policy and procedures and defined probity frameworks as set out in the evaluation plan.

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	2.2. Approvals to enter into contracts are obtained according to policy and procedures. 2.3. Commitments are not made and contractors do not commence until contracts are signed. 2.4. Contracts are structured to capture and address identified risks, protect both parties, provide the basis for due performance, and outline expected standards of behaviour. 2.5. Contracts are entered into that are valid and legally binding to the parties.
3. Debrief market and other stakeholders	3.1. Advice on the contractual arrangements is provided to internal stakeholders according to organisational policy and procedures. 3.2. Unsuccessful bidders are informed and debriefed upon request with constructive feedback on their proposals. 3.3. Details of successful providers are made public according to probity requirements, organisational protocols and public sector standards.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult and negotiate with contractors and stakeholders, involving complex oral and written exchanges of information
  - network within probity boundaries with diverse stakeholders and contractors
  - read complex documents, such as contracts, legislation and guidelines
  - provide feedback
- teamwork skills to:
  - work independently or under direction as appropriate to the situation
  - model team leadership approaches if appropriate
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to apply probity requirements in evaluating offers, formalising contracts and debriefing stakeholders
- initiative and enterprise skills to:
  - apply the content of complex documents, such as contracts, legislation and guidelines

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    - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of selecting providers and developing contracts
- 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
- technology skills to:
    - operate organisational IT systems
    - use electronic procurement templates

Required knowledge

- 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
    - such as OHS and equity and diversity
- 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

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	Competency must be demonstrated in the ability to select providers and develop contracts consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • apply recognised offer evaluation methodologies to select a preferred provider • make provider selections in accordance with the offer evaluation plan, procurement plan and relevant policy and legislation

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- work with subject matter experts, such as legal, financial, commercial and technical
- adhere to probity requirements
- make written recommendations about suppliers to delegates and higher management
- act within the scope of own delegations
- keep appropriate records
- debrief relevant stakeholders about their performance.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to selecting providers and developing contracts
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities associated with selecting providers and developing contracts
- case studies that incorporate dilemmas, and probity requirements relating to selecting providers and developing contracts

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for selecting providers and developing contracts
- review of selection reports, approvals and sign-offs, negotiation plans, draft contracts, final contracts, risk assessments and other documentation prepared by the candidate in a range of contexts
- review of stakeholder engagement approaches adopted by the candidate

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in

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assessment	different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • PSPETHC401A Uphold and support the values and principles of public service • PSPGOV417A Identify and treat risks • PSPGOV421A Exercise delegations • PSPLEGN401A Encourage compliance with legislation in the public sector • PSPPROC411A Plan procurement • PSPPROC412A Develop and distribute requests for offers • PSPPROC414A Manage contracts.

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.

Offers may include:	• delivery of goods for use or into store • provision of services • maintenance agreements • leasing agreements • consultancies • research and development • infrastructure assets

Evaluation:	• must include:
	  • processing offers
	  • determining value for money
	  • checking and investigating
	  • collating information
	  • comparative statements
	  • accountability
	• may include staged procurement

Probity requirements:	• may include:
	  • accountability
	  • transparency

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- confidentiality
- managing conflict of interest
- impartiality

- are maintained to:
  - encourage conformity to processes
  - facilitate accountability
  - ensure proponents are treated in a fair and equitable manner
  - encourage commercial completion
  - preserve public and private sector confidence in government processes

Allocation of business may include:

- single successful contractor
- multiple successful contractors
- standing offer (panel)
- multiple contracts as a result of a single request for offer

Contracts may include:

- memoranda of understanding and memoranda of agreement
- in-house option directives
- common use arrangements and standing offers
- inter and intra-government agreements
- service level agreements
- deeds of agreement

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PSPPROC503B Manage contract performance

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the competency required by people whose primary role is contract management 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.

In practice, managing contract performance may overlap with other public sector and local government generalist and specialist work activities, such as promoting the values and ethos of public service or local government, undertaking negotiations, promoting compliance with legislation in the public sector, finalising contracts, managing procurement risk, planning to manage a contract, planning for procurement outcomes and making procurement decisions.

PSPPROC414A Manage contracts is the appropriate unit for people undertaking contract management as a minor part of their work role.

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

Application of the Unit

This unit applies to those who may or may not have had involvement in the procurement process preceding execution of the contract.

Licensing/Regulatory Information

Not applicable.

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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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Manage the business relationship	1.1. ***Probity*** is managed in accordance with organisational requirements, ***legislation***, ***policy and public sector standards***. 1.2. Obligations to the contractor are met according to contractual arrangements. 1.3. Consideration of conflicts of interest and their resolution are recorded according to public sector standards and organisational requirements. 1.4. Business relationship with contractor is managed in the public interest through ***formal and informal mechanisms*** according to public sector standards and organisational policy and procedures.
2. Manage performance of the contract	2.1. Start-up or transition arrangements are implemented according to contract requirements and organisational procedures. 2.2. ***Contract management plan*** is monitored for effectiveness on a regular basis and adapted as necessary during the life of the contract. 2.3. Performance of ***contract*** is monitored against key performance indicators and tracking milestones to ensure obligations under the agreement are being met. 2.4. E-procurement, financial and other resources are managed as necessary according to contract

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	requirements and organisational procedures. 2.5. Emerging and potential ***risks*** are identified and managed according to organisational risk management procedures.
3. Manage contract issues	3.1. Contract ***variations*** are managed according to contract management plan, organisational policy and procedures, and probity requirements. 3.2. ***Early signs of under-performance*** are identified, and ***action is taken to improve performance*** to the agreed level and documented according to contract's communication and information policy. 3.3. ***Disputes*** and complaints are investigated and ***resolved*** or referred according to contract's management plan and contractual arrangements. 3.4. ***Negotiation of issues*** relating to the contract is conducted and approvals are obtained according to stipulations in the contract. 3.5. Conflict is addressed and resolved where possible or other ***actions*** are taken according to contractual arrangements. 3.6. Non-compliance with codes of conduct, codes of practice and standards of behaviour is dealt with in a timely manner.
4. Implement communication and information strategy	4.1. ***Communication*** on the performance of the contract is maintained with all stakeholders according to organisational protocols and public sector standards. 4.2. Management reporting is carried out according to tracking milestones and organisational requirements. 4.3. ***Contract information*** is maintained for ***organisational purposes*** according to organisational policy and procedures.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult and negotiate with contractors and stakeholders, involving complex oral and written exchanges of information
  - network, within probity boundaries, with contractors and stakeholders
  - read complex documents, such as contracts, legislation and guidelines

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    - write management reports and keep records of meetings, liaison, notes and follow-up actions
    - provide feedback
- teamwork skills to:
    - build effective working relationships with contractors and stakeholders, within probity boundaries
    - model effective team management approaches
    - respond to diversity
    - refer issues to the correct person
- problem-solving skills to:
    - resolve disputes, conflict and complaints
    - make judgements about when to refer disputes, conflict and complaints to others
    - apply understanding of supplier issues/supply chain management in the context of contract management
- initiative and enterprise skills to:
    - apply the content of complex documents, such as contracts, legislation and guidelines
    - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of contract management
- planning and organising skills to:
    - manage contract documentation
    - plan and organise contract meetings, reports and reviews
- learning skills to keep up-to-date with:
    - best practice examples in procurement practice
    - relevant procurement legislation, policies and procedures
- technology skills to:
    - operate organisational IT systems
    - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
    - relating to contract management, including environmental purchasing and corporate social responsibility guidance
    - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- contract management for a range of contractual situations
- privacy and confidentiality issues
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour

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relating to management of contracts and relationships with contractors
- whole-of-life considerations
- 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
- equal employment opportunity relevant to the management of contracts
- OHS requirements relevant to the management of contracts
- environmental, sustainability and corporate social responsibility principles relevant to the management of contracts

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

Competency must be demonstrated in managing contract performance consistently in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to:

- develop and implement an appropriate contract management plan, using templates where available
- develop and implement an appropriate transition plan, using templates where available
- develop and maintain a sound business relationship with contractors within probity guidelines, upholding probity standards in all dealings with them
- manage contractor performance so that goods and services are delivered according to the contract
- provide the contractor with performance feedback
- deal promptly and proactively with contract issues and disputes and refer to higher authority when this is not possible
- communicate effectively with internal and external stakeholders about the operation of the contract.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate

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occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to procuring goods and services and managing contracts
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities associated with managing contract performance
- case studies that incorporate dilemmas and probity requirements relating to managing contract performance.

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for managing contract performance
- review of contract management plans, contracts, contract variations, contractor performance reports, communication strategy and other documentation prepared by the candidate in a range of contexts
- review of stakeholder engagement approaches adopted by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC501B Promote the values and ethos of public service
- PSPGOV507A Undertake negotiations
- PSPLEGN501B Promote compliance with legislation in the public sector
- PSPPROC504B Finalise contracts
- PSPPROC505A Manage procurement risk
- PSPPROC506A Plan to manage a contract

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- PSPPROC507A Plan for procurement outcomes
- PSPPROC508A Make procurement decisions.

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.

Probity principles:

- may include:
  - accountability
  - transparency
  - confidentiality
  - managing conflict of interest
  - impartiality
- are maintained to:
  - ensure conformity to processes
  - facilitate accountability
  - ensure proponents are treated in a fair and equitable manner
  - encourage commercial completion
  - preserve public and private sector confidence in government processes.

Legislation, ***policy and public sector standards*** may include:

- financial management legislation
- government procurement, purchasing and contracting legislation, policy and guidelines
- council rules and by-laws
- public sector standards
- codes of conduct, codes of practice and standards of individual behaviour
- cross-cultural and social justice issues
- environmental and sustainability policies
- corporate social responsibility policies.

Formal and informal mechanisms may include:

- non-confrontational interaction
- hospitality
- formal contract variations
- formal negotiations

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- formal and informal meetings
- regular and *ad hoc* reporting
- review processes.

Contract management plan may include:

- risk management plan
- contingency plan
- communication and public relations plan
- human resource management plan
- disposal plan
- contract review plan
- setting up routines
- quality assurance systems
- arrangements for transfer of legal responsibility
- insurances
- strategies to avoid implied acceptance of varied conditions through non-enforcement of contractual obligations
- environmental/green procurement, sustainability and corporate social responsibility principles.

Contracts may include:

- formal written contracts
- standing offers (panels)
- multi-use lists and similar arrangements
- inter and intra-government agreements
- letters of intent
- memoranda of understanding and memoranda of agreement
- licensing agreements
- in-house option directives.

Risks may include:

- supplier inability to meet obligations
- end user or buyer inability to meet obligations
- scope creep
- client requirements not fully understood
- becoming too dependent on a single supplier
- disruption to continuity and consistency of service if too many suppliers are selected
- other environmental influences
- corruption risks
- probity risks.

Variation to agreements may arise from:

- change of scope
- negotiation of new terms and conditions
- dissolution of contracts

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- inability to deliver.

Early signs of under-performance may be detected through:

- tracking milestones
- regular meetings
- meeting records and follow-up
- file management and audit trail
- stakeholder surveys on performance
- ongoing review of deliverables.

Actions taken to improve performance may include:

- discussion with contractor
- regular interaction
- ongoing performance feedback
- provision of support
- expert advice.

Disputes may include:

- disputes over:
  - requirements
  - delivery schedules
  - price changes
  - additional tasking
  - payment schedules
- complaints from third parties
- formal and informal.

Techniques available to ***resolve*** disputes include:

- conference
- negotiation
- mediation
- arbitration
- resort to contractual conditions
- litigation.

Negotiation of issues may include:

- contract variations
- continuous improvement
- innovations
- non-compliance
- consequences.

Actions as a result of unresolved conflict may include:

- mediation
- court action
- termination of contract.

Communication strategies may include:

- clear communication
- understanding the needs of the service provider and the client
- setting regular times to talk, meet or check on progress

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- protocols for dealing with other stakeholders
- emergency contact arrangements
- diary system to monitor milestones, timeframes, receipt of deliverables, etc.
- strategies for ensuring information flow at critical stages of the contract.

Contract information may include:

- contract and variations
- contract management plan
- financial records, including funding submissions, budgets, delegations, invoices and payments
- contractor performance information
- contract reports
- information about disputes and other issues
- complaints and compliments.

Organisational purposes may include:

- probity and accountability
- budget reporting
- feeding into future procurement processes
- performance management of suppliers
- internal and external reviews and audits
- governance requirements
- legal compliance.

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PSPPROC504B Finalise contracts

Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the ability to finalise processes for contracts. It includes completing contracts and implementing a contract review strategy.

In practice, finalising contracts may overlap with other public sector generalist and specialist work activities, such as promoting the values and ethos of public service and local government, undertaking negotiations, promoting compliance with legislation in the public sector or local government, managing contract performance, managing procurement risk, planning to manage a contract, planning for procurement outcomes and making procurement decisions.

PSPPROC414A Manage contracts is the appropriate unit for people undertaking contract management as a minor part of their work role.

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

Application of the Unit

The unit applies to those whose primary role is contract management.

Licensing/Regulatory Information

Not applicable.

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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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Complete contracts	1.1. ***Contracts*** due to expire are reviewed to determine future requirements, and options for meeting those requirements are canvassed in sufficient time for decision making and transition to occur. 1.2. Strategies are implemented to manage closure, renewal of contracts, or transition to a new contract according to organisational guidelines, probity requirements and public sector standards. 1.3. Contracts are finalised, amended, cancelled or terminated according to contractual arrangements. 1.4. Consultation is undertaken with contractor, and a contract completion report is issued addressing the performance of contractor and contract manager according to organisational requirements and public sector standards.
2. Implement contract review strategy	2.1. ***Timing of contract review*** is determined to ensure a smooth transition to post-contract arrangements. 2.2. ***Contract review*** is undertaken covering contract management, contractor performance relevant to measures at each stage of the contract, user satisfaction and audit results. 2.3. Where measures or outcomes are not met in full, ***variances*** are documented and explained.

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2.4. Review report is prepared documenting outcomes against plans, final costs, user satisfaction, lessons learnt and any shortcomings in contract planning, management policies and procedures.

2.5. Recommendations for improvement are made and supported with evidence, as a result of lessons learnt.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult and negotiate with contractors and stakeholders, involving complex oral and written exchanges of information
  - write review and closure reports
  - make recommendations about improvements to the contract management process
  - provide feedback
- teamwork skills to:
  - model effective team management approaches
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to finalise outstanding issues so the contract can be closed
- initiative and enterprise skills to identify improvements to the contract management process of contract management
- planning and organising skills to:
  - manage contract closure documentation
  - plan and organise contract closure meetings, reports and reviews
- learning skills to keep up-to-date with:
  - best practice examples in procurement practice
  - relevant procurement legislation, policies and procedures
- technology skills to:
  - operate organisational IT systems
  - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  - relating to contract finalisation and review, including environmental purchasing

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and corporate social responsibility guidance
    - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- contract finalisation and review for a range of contractual situations
- 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
- information, knowledge management and record keeping for official or historical records
- equal employment opportunity
- 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

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	Competency must be demonstrated in the ability to finalise contracts consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • develop and implement an appropriate review strategy for contracts that are ending • complete relevant contract closure processes • ensure appropriate records have been kept • apply contract review techniques • make written recommendations for improvements to the procurement process based on review results • uphold probity standards in all dealings with contractors. **Consistency in performance** Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.
Context of and specific resources for	The unit of competency is to be assessed in the workplace or a

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assessment	simulated workplace environment. Access may be required to: • legislation, policy, procedures and protocols relating to procuring goods and services, and managing and finalising contracts • codes of conduct and codes of practice • workplace scenarios and case studies relating to a range of procurement activities associated with finalising contracts • case studies that incorporate dilemmas, and probity requirements relating to finalising contracts.
Method of assessment	The following assessment methods are suggested: • questions to assess understanding of relevant legislation and procedures • review of strategies and approaches adopted for finalising contracts • review of contract management plans, contracts, contract variations, contractor performance reports, contract closure plans, transition plans, risk assessments and other contract finalisation documentation prepared by the candidate in a range of contexts • review of stakeholder engagement approaches adopted by the candidate. In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.
Guidance information for assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • PSPETHC501B Promote the values and ethos of public service • PSPGOV507A Undertake negotiations • PSPLEGN501B Promote compliance with legislation in the public sector • PSPPROC503B Manage contract performance • PSPPROC505A Manage procurement risk • PSPPROC506A Plan to manage a contract • PSPPROC507A Plan for procurement outcomes • PSPPROC508A Make procurement decisions.

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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.

Contracts may include:
- formal written contracts
- standing offers (panels)
- multi-use lists and similar arrangements
- inter and intra-government agreements
- letters of intent
- memoranda of understanding and memoranda of agreement
- licensing agreements
- in-house option directives.

Timing of contract review may include:
- periodically throughout the contract
- when performance issues arise
- prior to contract completion
- concurrently with contract renewal process
- after the contract is completed.

Contract review may include:
- planning process
- evaluation considerations at each stage of contract
- sources and methods of gathering data
- role of audit trails
- measuring outputs
- key performance indicators and their review
- meeting client needs
- innovation
- strategies for continuous improvement.

Variances may include:
- change of scope
- negotiation of new terms and conditions
- strategies for dealing with contractor performance
- dissolution of contract.

Unit Sector(s)

Not applicable.

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Competency field

Procurement and Contract Management.

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PSPPROC506A Plan to manage a contract

Modification History

PSPPROC506A Release 2: Layout adjusted. No changes to content.

PSPPROC506A Release 1: Primary release.

Unit Descriptor

This unit covers the ability to establish arrangements for contract management. It includes confirming contract requirements, preparing a contract management plan, and implementing contract strategies and contractual arrangements.

In practice, planning to manage a contract may overlap with other public sector and local government generalist and specialist work activities, such as promoting the values and ethos of public service or local government, undertaking negotiations, promoting compliance with legislation in the public sector, managing contract performance, finalising contracts, managing procurement risk, planning for procurement outcomes and making procurement decisions.

PSPPROC414A Manage contracts is the appropriate unit for people undertaking contract management as a minor part of their work role.

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

Application of the Unit

This unit applies to those whose primary role is contract management, and who may or may not have had involvement in the procurement process preceding execution of the contract.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm contract requirements	1.1. ***Legislation***, ***public sector standards and organisational requirements*** relating to ***probity***, financial management, approvals and ***other considerations*** are identified for inclusion in the ***contract*** management plan. 1.2. ***Contract requirements*** are re-confirmed with all parties. 1.3. Obligations to the contractor, limits of authority and ***delegations*** relating to contract are determined according to contractual arrangements and organisational policy and procedures. 1.4. Start-up or transition arrangements are confirmed.
2. Prepare contract management plan	2.1. ***Contract risks*** are identified and risk management plan is developed in line with contract requirements and organisational policy and procedures. 2.2. Procedures to identify, receive and address contract ***variations*** are determined according to contract requirements and organisational policy and procedures. 2.3. ***Procedures*** to investigate, resolve or refer ***disputes*** or complaints are determined according to contract requirements and organisational policy and procedures. 2.4. Key performance indicators are developed and negotiated, and ***administrative processes*** are identified and approved for the life of the contract according to organisational policy procedures. 2.5. ***Contract management plan*** that addresses key elements is documented, approved and maintained according to organisational requirements. 2.6. Expected standards of behaviour, probity and privacy principles are applied to all elements of contract management plan. 2.7. Environmental, sustainability and corporate social

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	responsibility principles are applied to all elements of contract management plan.
3. Develop stakeholder relationships	3.1. ***Stakeholder*** networks and relationships are identified. 3.2. Networking strategies are used, within probity boundaries, to establish, develop and maintain working relationships to promote benefits to the contract requirements. 3.3. Confidence of stakeholders is developed and maintained through high standards of behaviour and ethical conduct. 3.4. Negotiation strategies are used to achieve positive outcomes when difficult situations arise. 3.5. Communication requirements are identified and confirmed in line with contractual obligations and stakeholder needs.
4. Implement contract strategies	4.1. Requirements of confidentiality and freedom of information are identified for the contract. 4.2. ***Communication/information strategy*** is developed that matches needs of the organisation, the contract and the contractor's business environment. 4.3. Contract review requirements are established with stakeholders. 4.4. ***Contract review strategy*** is developed to review management of the contract, contractor performance and user satisfaction.
5. Implement contractual arrangements	5.1. Business relationship with contractor is established and managed according to organisational policy and procedures and probity requirements. 5.2. Start-up or transition arrangements are implemented. 5.3. Financial, administrative and information management processes are established. 5.4. Contractual arrangements are implemented according to contract management plan. 5.5. Appropriate ***contract records*** are maintained for the life of the contract.

Required Skills and Knowledge

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

Required skills

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- communication skills to:
  - consult and negotiate with contractors and stakeholders
  - network, within probity boundaries, with contractors and stakeholders
  - develop a written contract management plan and sub-plans
  - read complex documents, such as contracts, legislation and guidelines
  - provide feedback
- teamwork skills to:
  - model effective team management approaches
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to:
  - apply OHS requirements in the context of contract management
  - apply understanding of supplier issues and supply chain management in the context of procurement risk management
- initiative and enterprise skills to:
  - apply the content of complex documents, such as contracts, legislation and guidelines
  - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of planning for contract management
- planning and organising skills to manage and update the contract management plan and sub-plans
- learning skills to keep up-to-date with:
  - best practice examples in procurement practice
  - relevant procurement legislation, policies and procedures
- technology skills to:
  - operate organisational IT systems
  - use electronic procurement templates

Required knowledge

- 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
  - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- contract management planning for a range of contractual situations
- privacy and confidentiality issues
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- whole-of-life considerations

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- financial and accounting issues relevant to the contract
- equal employment opportunity relevant to the contract
- OHS requirements relevant to the contract

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

Competency must be demonstrated in the ability to plan to manage a contract consistently in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to:

- develop a contract management strategy in consultation with key stakeholders
- develop a contract management plan suited to more complex contracts, using templates if available, which may include sub-plans such as risk, transition and probity
- implement the contract management strategy and the contract management plan
- develop and maintain a sound business relationship with internal and external stakeholders
- manage the performance of contractors to ensure the effective delivery of value for money outcomes under the contract
- manage more complex contract disputes to achieve prompt resolution and refer to higher authority when necessary
- review contract throughout to identify opportunities for continuous improvement
- act within own delegations and refer issues to higher authority when necessary.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

Access may be required to:

- legislation, policy, procedures and protocols relating to procuring goods and services and managing contracts

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- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities associated with planning to manage a contract
- case studies that incorporate dilemmas, and probity requirements relating to planning to manage a contract.

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for planning to manage a contract
- review of contract management plans, contracts, probity plans, budgets, transition plans, approvals and sign-offs, and other documentation prepared by the candidate in a range of contexts
- review of stakeholder engagement approaches adopted by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC501B Promote the values and ethos of public service
- PSPGOV507A Undertake negotiations
- PSPLEGN501B Promote compliance with legislation in the public sector
- PSPPROC503B Manage contract performance
- PSPPROC504B Finalise contracts
- PSPPROC505A Manage procurement risk
- PSPPROC507A Plan for procurement outcomes
- PSPPROC508A Make procurement decisions.

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

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situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Legislation**, **public sector standards and organisational requirements may include:	• financial management legislation • government procurement, purchasing and contracting legislation, policy and guidelines • ethics standards • codes of conduct and codes of practice • environmental purchasing

Probity principles:	• may include:
	  • accountability
	  • transparency
	  • confidentiality
	  • managing conflict of interest
	  • impartiality
	• are maintained to:
	  • ensure conformity to processes
	  • facilitate accountability
	  • ensure proponents are treated in a fair and equitable manner
	  • encourage commercial completion
	  • preserve public and private sector confidence in government processes

Other considerations may include:	• corporate governance • intellectual property • privacy • freedom of information requirements • public liability insurance considerations
Contracts may include:	• formal written contracts • standing offers (panels) • multi-use lists and similar arrangements • inter and intra-government agreements • letters of intent • memoranda of understanding and memoranda of agreement • licensing agreements • in-house option directives
Contract requirements may include:	• terms and conditions • specifications • risk • managing hospitality • clauses dealing with:

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- variations
- insurances
- notices
- disputes
- intellectual property
- privacy
- confidentiality
- milestones
- payments
- breaches

Delegations may include:

- financial delegations
- procurement delegations
- compliance with instructions or finance circulars
- special consideration if they concern travel, computers or software, leasing arrangements or issuing indemnities, or other special categories of goods and services
- other delegations, such as disposals and human resources
- confirmation by chief financial officer
- ministerial authorisation

Contract risks may include:

- contextual/environmental factors
- supplier inability to meet obligations
- end user or buyer inability to meet obligations
- unclear contract terms and conditions
- contractual disputes
- factors outside the control of either party, such as global health pandemic, failure of third-party businesses, and natural disasters
- implications if dependence on one supplier, versus risks in lack of continuity and consistency of services provided

Variation to agreements may arise from:

- change of scope
- negotiation of new terms and conditions
- dissolution of contracts

Procedures to resolve disputes may include:

- conference
- negotiation
- mediation
- arbitration
- resort to contractual conditions
- litigation

Disputes may include:

- disputes over:
  - requirements
  - delivery schedules

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- price changes
- additional tasking
- payment schedules
- complaints from third parties

Administrative processes may include:

- file and records management
- audit trail
- methodology for recording meetings
- notes and follow-ups of meetings and actions agreed
- management reporting

Contract management plan may include:

- risk management plan
- contingency plan
- communication and public relations plan
- human resource management plan
- disposal plan
- contract review plan
- setting up routines
- quality assurance systems
- arrangements for transfer of legal responsibility
- insurances
- strategies to avoid implied acceptance of varied conditions through non-enforcement of contractual obligations
- environmental/green procurement, sustainability and corporate social responsibility principles

Stakeholders may include:

- contractor
- buying organisation
- board of management
- steering committee
- advisory panel
- staff
- union
- industry
- client
- end user
- parliamentarian
- the public

Communication/ information strategies may include:

- setting regular times to talk, meet or check on progress
- protocols for dealing with other stakeholders
- appeals mechanisms for resolving conflict between clients and service providers
- clear communication
- reliability

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	• emergency contact arrangements • diary system to monitor milestones, timeframes, receipt of deliverables, etc. • strategies for ensuring information flow at critical stages of the contract
Contract review strategy may include:	• planning process • evaluation considerations at each stage of the contract • sources and methods of gathering data • role of audit trails • measuring outputs • meeting client needs • innovation • strategies for continuous improvement
Contract records may include:	• contract and variations • contract management plan • financial records, such as funding submissions, budgets, delegations, invoices and payments • contractor performance information • contract reports • information about disputes and other issues • complaints and compliments

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PSPPROC607A Manage strategic contracts

Modification History

PSPPROC607A Release 2: Layout adjusted. No changes to content.

PSPPROC607A Release 1: Primary release.

Unit Descriptor

This unit covers the competencies required to manage contracts for strategic purchases, to effectively minimise risks and achieve value for money to meet an organisation's core objectives. It includes managing the establishment, performance and evaluation of strategic contracts.

In practice, managing strategic contracts may occur in the context of other generalist and specialist work activities, such as maintaining and enhancing confidence in public service or local government, establishing and maintaining strategic networks, managing compliance with legislation in the public service or local government, managing risk, developing a business case, planning for strategic procurement, coordinating strategic procurement and negotiating strategic procurement.

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

Application of the Unit

This unit applies to those in specialist procurement and contracting.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

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 range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Manage contract establishment	1.1. Requirements of ***contracts and strategic initiatives*** are discussed, clarified and agreed by all parties. 1.2. Responsibilities for establishing and carrying out procedures are assigned to achieve contract outcomes. 1.3. Effective communication strategies and processes are established and implemented to assist ongoing communication between internal and external ***stakeholders*** and contractors. 1.4. Relationship management is undertaken of all levels of personnel involved in procurement and contract management, within probity boundaries. 1.5. Strategic relationships are established and managed within probity boundaries to improve procurement capability and performance. 1.6. Risk management plans are updated according to organisational policy and procedures.
2. Manage contract performance	2.1. Progress of contracts is ***monitored*** against set targets and performance measures to ensure success of procurement activities. 2.2. Should monitoring find that set targets, performance measures and probity requirements are not being met, action is taken to rectify performance in a timely manner. 2.3. Advice and support are provided to solve problems, make improvements and maintain progress. 2.4. Disputes are managed promptly according to contractual conditions to achieve resolution and maintain contract performance and progress. 2.5. Opportunities to continuously improve procurement outcomes are sought and negotiated with contractors. 2.6. Approvals are provided or gained for ***contract***

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	variations that are negotiated and agreed between the parties. 2.7. Opportunities are provided for stakeholders and contractors to have input into and receive feedback on progress during the performance of the contract. 2.8. Internal and external stakeholders are engaged as necessary throughout the life of the contract to maintain progress.
3. Manage contract evaluation	3.1. Evaluation of contract performance is undertaken relative to planned performance measures and in consultation with stakeholders and contractors. 3.2. Where stakeholders and contractors do not agree, dispute resolution is undertaken according to organisational policy and procedures. 3.3. Conclusions are detailed against agreed criteria to provide a complete picture of ***performance of contractors***, organisation's ***procurement processes*** and ***value for money***. 3.4. Performance of strategic initiatives is measured relative to planned outcomes in consultation with industry and other stakeholders. 3.5. Lessons learnt from evaluations of contracts and strategic initiatives are documented according to organisational requirements and used to continuously improve future procurement activities. 3.6. Contractors and stakeholders are advised of evaluation outcomes in a timely manner according to organisational guidelines.

Required Skills and Knowledge

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

Required skills

- communication skills to:
  - consult and negotiate with stakeholders
  - network, within probity boundaries, with stakeholders
  - build and manage effective working relationships
  - write business cases, plans, reports, submissions and other complex documents
  - read complex documents, such as contracts, legislation and guidelines
  - provide feedback
- teamwork skills to:

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    - manage teams of expert negotiators in functions such as finance, legal, technical and engineering
    - manage strategic relationships
    - model effective management and leadership approaches
    - respond to diversity
    - refer issues to the correct person
- problem-solving skills to:
    - apply decision-making processes or methodologies
    - identify and resolve strategic contract management issues
    - apply understanding of supplier issues and supply chain management in the context of managing strategic contracts
- initiative and enterprise skills to:
    - identify, assess and implement opportunities for performance improvement
    - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of managing strategic contracts
- planning and organising skills to:
    - undertake research and business analysis
    - manage financial and other resources
    - manage strategic procurement contracts, contract management plans and sub-plans
- learning skills to keep up-to-date with:
    - best practice examples in strategic procurement
    - relevant procurement legislation, policies and procedures
- technology skills to:
    - operate organisational IT systems
    - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
    - relating to managing strategic contracts, including environmental purchasing guidance
    - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes
- aspects of law of contract, trade practices law, and commercial law relating to managing strategic contracts
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- government procurement environment
- legal requirements of government contracting
- financial rules and regulations

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- implications of particular contracting arrangements
- whole-of-life considerations
- procurement management processes
- cultural issues relating to contract management and industry development
- relationship management at all personnel levels
- environmental, sustainability and corporate social responsibility principles relevant to managing strategic contracts

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

Competency must be demonstrated in managing strategic contracts consistently and in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to:

- develop contract management plans and sub-plans suited to the nature of the contracts
- establish contract management relationships with stakeholders using strategic techniques such as start up workshops, service level agreements, etc.
- implement contract management plans
- manage contractors to ensure the delivery of contract outcomes, using flexibility and initiative to deal with issues as they arise
- implement contract performance measures
- provide contractors with performance feedback
- deal promptly and proactively with contract disputes and refer to higher authority when this is not possible
- communicate effectively with internal and external stakeholders about the operation of contracts
- uphold probity standards in all dealings with contractors.

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment

The unit of competency is to be assessed in the workplace or a simulated workplace environment.

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Access may be required to:

- legislation, policy, procedures and protocols relating to managing strategic contracts
- codes of conduct and codes of practice
- long-term government policy papers, such as White Papers
- strategic procurement plans and direction statements
- workplace scenarios and case studies relating to a range of strategic procurement and disposal activities.

Method of assessment

The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for managing strategic contracts
- review of contract management plans and related sub-plans, such as transition plans, probity plans, contract variations, contract performance reports and reviews, budgets, negotiation notes from meetings with contractors, risk assessments, formal sign-offs and approvals, contract closure reports, and other documentation prepared or reviewed by the candidate in a range of contexts
- review of stakeholder engagement approaches adopted by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Candidates for this qualification must demonstrate a high level of understanding and practical workplace application of underpinning knowledge. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC601B Maintain and enhance confidence in public service
- PSPLEGN601B Manage compliance with legislation in the public sector
- PSPMNGT607B Develop a business case
- PSPMNGT608B Manage risk
- PSPPM601B Direct complex project activities
- PSPPROC604B Plan for strategic procurement
- PSPPROC605B Coordinate strategic procurement

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- PSPPROC606B Negotiate strategic procurement.

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.

Contracts and strategic initiatives may include:

- non-traditional procurement and finance activities
- strategic procurement activities, such as industry development
- in-house option directives
- inter and intra-government agreements
- memoranda of understanding and memoranda of agreement
- public private partnerships (PPP)
- purchases from suppliers
- coordinated procurement arrangements
- whole of government procurement arrangements
- cooperative procurement arrangements.

Stakeholders may include:

- end users
- customers or clients
- sponsors
- current or potential providers or suppliers
- technical or functional experts or advisers
- commonwealth, state or territory, and local government
- the organisation
- other public sector organisations
- employees, unions and staff associations
- industry bodies
- local communities
- lobby groups and special user groups.

Monitoring may involve:

- progress meetings and regular progress reports from contractor
- visits to contractor's premises
- provision of samples
- tests and verification
- independent audit
- end-user feedback.

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Contract variation may include modification of:	• targets • performance measures • procurement plans • resourcing • monitoring and evaluation processes.
Evaluation of ***contractor performance*** may include:	• strengths and weaknesses • client acceptance of service delivery (client satisfaction) • meeting delivery and completion dates • compliance with other contractual requirements • performance in relation to relevant policy objectives, such as industry development, care for the environment, OHS and affirmative action • achievements of the contractor in developing Australian and New Zealand supply networks • general relationships, including effectiveness of communication at all levels • performance of key technical personnel • acceptability and cost of whole-of-life technical support, including lead times and availability of spares and maintenance services • achievements in innovation and quality improvement programs • acceptability and suitability for future agreements, including potential status as an approved contractor • adherence to codes of practice and codes of conduct.
Evaluation of organisation's ***procurement processes*** may focus on:	• effectiveness of project management, including project plan and responsibilities and accountabilities set out in it • quality of the business case, as indicated by achievement of planned outcome and contribution to program objectives • effectiveness of contractor qualification processes • value obtained in bid clarification and post-tender negotiation • effectiveness of project management systems, focusing particularly on management information • effectiveness of risk management, including corruption risks and probity risks • methods for controlling variations in cost, time, quality and performance from initial planning to completion • adequacy of safeguards against fraud, error and impropriety • incidence of material losses due to waste or

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	inefficiency • overall performance in terms of cost, time, service and quality • compliance with procurement policy.
Value for money must reflect:	• whole-of-life program benefits • residual values • disposal costs or disposal return • costs of parts • servicing and maintenance • industry benchmarks.

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.

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PUAWER001B Identify, prevent and report potential workplace emergency situations

Modification History

Release	TP version	Comments
2	PUA12 V1	Layout adjusted. Application, PC and Required Skills revised.
1	PUA00 V8.1	First release in TGA.

Unit Descriptor

This unit covers the competency required to identify and prevent the development of workplace emergency situations, or to minimise their consequences, and to report if emergency protection systems, emergency control equipment and evacuation systems are compromised.

For this unit the term workplace is defined as the area encompassed by an individual's responsibilities. All aspects of the unit must be undertaken in line with legislative requirements, workplace policies and procedures, and accepted safe practices.

This unit:

- has been developed to cover the broad range of emergencies and workplaces as considered in Australian Standard 37452002
- covers the work required before the emergency services or specialist response team arrives
- does not cover the specific use of equipment to prevent workplace emergency situations

Application of the Unit

This unit applies to employees in the workplace within all industries and in all contexts.

This unit places responsibility on individual employees in the workplace to identify, prevent and report potential workplace emergency situations. This requirement is consistent with the legislative obligations of employees as prescribed in OHS legislation. The unit may also be used for planning for future operations in the workplace.

The knowledge and skills gained through the completion of this unit may be applied by all employees across all industries.

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Licensing/Regulatory Information

Not applicable.

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 required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify, monitor and report situations that could lead to workplace emergencies	1.1 Situations that could lead to workplace emergencies are identified. 1.2 Immediate work area is routinely checked for any situations that could lead to emergencies. 1.3 ***Hazardous work*** is monitored to ensure precautions and workplace procedures are followed.
2. Identify, report and correct situations that could prevent workplace emergencies from being safely handled	2.1 Principles of operation of relevant ***emergency protection systems*** are identified. 2.2 Principles of operation of relevant ***emergency control equipment*** are identified. 2.3 Evacuation systems are identified. 2.4 Immediate work area is routinely checked for any situations that could lead to emergency protection systems, emergency control equipment and evacuation systems being made inoperable. 2.5 Situations that could lead to emergency protection systems, emergency control equipment and

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ELEMENT	PERFORMANCE CRITERIA
	evacuation systems being made inoperable are identified and corrected.
	2.6 Workplace procedures and accepted safe practices are regularly monitored and followed to ensure operability of emergency protection systems, emergency control equipment and evacuation systems.

Required Skills and Knowledge

This describes the essential skills and knowledge and their level, required for this unit.

Required Skills

- communicate effectively
- identify hazards in the workplace that reduce the effectiveness of emergency protection systems, emergency control equipment and evacuation systems
- monitor the work area to identify new and emerging risks on an on-going basis

Required Knowledge

- basic types, principles of operation and limitations of emergency protection systems and emergency control equipment typically installed in the workplace
- hazards in the workplace that reduce the effectiveness of emergency protection systems and emergency control equipment
- procedures for identifying, minimising or preventing, correcting and reporting situations within the organisation that may lead to workplace emergencies
- safe practices applicable to the workplace that help to prevent emergencies
- situations in the workplace that may lead to emergencies
- situations that may make emergency protection systems and emergency control equipment inoperable

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to identify emergency protection systems, emergency control equipment and evacuation systems; to identify and report situations that may lead to or contribute to workplace incidents and/or emergencies.
	Consistency in performance

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	Competency should be demonstrated in the workplace.
Context of and specific resources for assessment	**Context of assessment** Competency should be assessed in the workplace. **Specific resources for assessment** Access to: • scenarios that reflect a range of emergency situations that may be expected in the workplace • appropriate emergency protection systems and emergency control equipment • relevant standards and workplace procedures

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 in the Performance Criteria is detailed below.

Hazardous work may include:	• handling dangerous goods and hazardous materials (including waste) • hot work • manufacturing • unsafe manual handling • using, mixing and/or moving chemicals • working at heights, in confined spaces, in poorly ventilated spaces or around noise • working around traffic • working with plant and machinery • working with unstable equipment or equipment that has deteriorated
Emergency protection systems may include:	• automatic fire/leak/spill/movement detectors • CCTV • communications systems • manual alarms • passive installations, fire/smoke doors, fire walls • security infrastructure • special hazard identification systems • spill/leak containment systems • sprinkler and deluge systems • warning systems
Emergency control	• communications equipment

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equipment may include:	• escape equipment • fire/smoke detection, alarm, mitigation and suppression systems • first-aid kits • forcible entry tools • initial response firefighting equipment • isolation barriers • personal protection kits • shower and eyewash • spill control kits/equipment
Evacuation systems may include:	• access, egress • exits • procedures
Situations that could lead to emergency protection systems, emergency control equipment and evacuation systems being made inoperable may include:	• blocking egress • compromising security infrastructure or integrity • emergency lighting and/or exit lighting being damaged, missing or under service • locking or blocking exits • impairing exits and/or pathways to exits • interfering with alarm systems • not replacing or replenishing used emergency equipment • not reporting damage to emergency control equipment or facilities • propping open fire/smoke doors

Unit Sector(s)

Not applicable.

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PUAWER002B Ensure workplace emergency prevention procedures, systems and processes are implemented

Modification History

Release	TP version	Comments
2	PUA12 V1	Layout adjusted. Application revised.
1	PUA00 V8.1	First release in TGA.

Unit Descriptor

This unit covers the competency required to implement workplace emergency prevention procedures within a workplace or a defined group of workplaces.

The person undertaking this work may be supervising some people in the workplace. All aspects of the unit must be undertaken in line with legislative requirements, workplace policies and procedures, and accepted safe practices.

This unit has been developed to cover the broad range of emergencies and workplaces as considered in Australian Standard 3745—2010.

Application of the Unit

This unit applies to employees in the workplace within all industries and in all contexts.

This unit places responsibility on individual employees in the workplace to implement workplace emergency prevention procedures, systems and processes; coordinate workplace emergency prevention inspections; review and report on workplace procedures; and undertake routine hazard analysis consistent with job function.

The knowledge and skills gained through the completion of this unit may be applied by employees across all industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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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 required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Ensure workplace emergency prevention processes are implemented	1.1 Workplace emergency prevention inspections are carried out according to workplace procedures, safe practices and workplace emergency management plan. 1.2 ***Situations that could lead to workplace emergencies*** are identified, mitigated or corrected, and recorded or reported. 1.3 Processes are reviewed and reported.
2. Ensure appropriate hazard analysis is undertaken and results are implemented	2.1 Workplace procedures are implemented to ensure that an emergency prevention ***hazard analysis*** in the area is routinely undertaken. 2.2 Personnel are designated to implement the processes according to the hazard analysis. 2.3 Workplace procedures are implemented to ensure personnel comply with identified emergency prevention processes.
3. Ensure workplace emergency protection systems, emergency control equipment and evacuation systems remain effective	3.1 Workplace procedures are implemented to ensure work practices do not interfere with the area's ***emergency protection systems***, ***emergency control equipment*** and ***evacuation systems.*** 3.2 Workplace procedures are implemented to ensure problems or deficiencies with area emergency protection systems, emergency control equipment and evacuation systems are corrected and reported.

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Required Skills and Knowledge

This describes the essential skills and knowledge and their level, required for this unit.

Required Skills

- communicate effectively
- delegate affectively according to workplace procedures and level of responsibility
- effective leadership and decision-making to ensure safety in the workplace
- monitor and review the work area to identify new and emerging risks on an ongoing basis

Required Knowledge

- basic types, principles of operation and limitations of emergency prevention and protection systems and emergency control equipment typically installed in the workplace
- hazard analysis processes
- reporting procedures
- workplace procedures to rectify problems

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to identify workplace emergency prevention procedures and to ensure these procedures are routinely implemented.

Consistency in performance

Competency should be demonstrated over time with a range of emergencies that could be expected in the workplace.

Context of and specific resources for assessment

Context of assessment

Competency should be assessed in the workplace or in a simulated workplace.

Specific resources for assessment

Access to:

- scenarios that reflect a range of emergency situations that may be expected in the workplace
- relevant workplace hazard analysis results

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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 in the Performance Criteria is detailed below.

Situations that could lead to workplace emergencies may include:	• deficient or ineffective security arrangements • fire/smoke hazards • poor housekeeping • unreported faults • unsafe practices • unsafe storage and handling of dangerous goods and hazardous materials • unsafe use of electrical or mechanical equipment
Emergency protection systems may include:	• automatic fire/leak/spill/movement detectors • communications equipment • CCTV • fire/smoke doors • manual alarms • security infrastructure • special hazard identification systems • spill/leak containment systems (sprinkler and deluge systems • warning systems
Emergency control equipment may include:	• communications equipment • escape equipment • fire/smoke detection, alarm, mitigation and suppression systems • first-aid kits • forcible entry tools • initial response firefighting equipment • isolation barriers • personal protection kits • shower and eyewash • spill control kits/equipment
Evacuation systems may include:	• access, egress • exits • procedures

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Unit Sector(s)

Not applicable.

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PUAWER003B Manage and monitor workplace emergency procedures, equipment and other resources

Modification History

Release	TP version	Comments
2	PUA12 V1	Layout adjusted. Application revised.
1	PUA00 V8.1	First release in TGA.

Unit Descriptor

This unit covers the competency required to manage and monitor workplace emergency prevention and control structures for a complex workplace or a defined group of workplaces.

It involves managing problems and resolving issues in relation to the organisation's workplace emergency prevention process and emergency control structures.

This unit has been developed to cover the broad range of emergencies and workplaces as considered in Australian Standard 3745—2010

All aspects of the unit must be undertaken in line with legislative requirements, workplace policies and procedures, and accepted safe practices.

Application of the Unit

This unit applies to employees in the workplace within all industries and in all contexts, who are delegated responsibility for implementing emergency prevention measures that may include:

- the purchasing, installation, commissioning, and maintenance of emergency control equipment
- hazard risk identification
- mitigation and recording of workplace emergency risks
- recording and reporting on emergency control equipment and faults
- monitoring and reviewing the currency and compliance of workplace emergency plans
- providing advice and guidance to the emergency planning committee and the emergency control organisation
- ensuring on-going compliance of workplace emergency procedures and training standards in accordance with relevant standards and statutory requirements

The knowledge and skills gained through the completion of this unit may be applied by employees across all industries.

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Licensing/Regulatory Information

Not applicable.

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 required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Manage emergency measures and practices	1.1 ***Emergency prevention measures***, practices and control equipment are identified, documented and disseminated according to the requirements of the workplace emergency procedures. 1.2 Purchasing, installation and commissioning procedures are followed. 1.3 Instructions in the safe and effective use and care of ***emergency control equipment*** are documented and disseminated. 1.4 ***Situations that could lead to workplace emergencies*** are identified and recorded, and options for mitigating or avoiding these situations are formulated, tested and implemented.
2. Manage emergency control equipment	2.1 Emergency control equipment maintenance requirements are specified and managed. 2.2 Instructions and training are provided for on-site personnel in the care of emergency control equipment.

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Equipment maintenance is audited for compliance.
	2.4 Emergency control equipment is assessed for useability and accessibility and is reported according to workplace procedures.
	2.5 Procedures are followed to correct emergency control equipment defects and deficiencies.
3. Record and report emergency control equipment and faults	3.1 Schedule for verifying and reporting faults is developed and implemented.
	3.2 Details and nature of faults are recorded and where possible rectified.
	3.3 Maintenance logs, records and tests are consulted and corrective action is verified.
	3.4 Reports on faults verified are provided in a timely manner and contain recommendations for improving verified faults .
	3.5 Frequency of occurrence of faults is monitored and reported.
4. Monitor emergency control structures	4.1 Currency, compliance and appropriateness of the workplace emergency plan are monitored.
	4.2 Emergency control organisation activities are monitored to ensure they comply with workplace emergency plans, relevant standards and are appropriate for the workplace.
	4.3 Advice is provided to emergency planning committee and emergency control organisation.
	4.4 Compliance with relevant standards and statutory requirements is checked and appropriate recommendations are made where compliance is an issue.
	4.5 Implementation of hazard analysis recommendations is monitored.
	4.6 Representation on the emergency planning committee and emergency control organisation is monitored according to the workplace emergency plan, relevant standards and statutory requirements.
	4.7 Recommendations and reports are provided to stakeholders.
	4.8 Training is provided and monitored in accordance with the workplace emergency plan and statutory requirements.

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Required Skills and Knowledge

This describes the essential skills and knowledge and their level, required for this unit.

Required Skills

- analyse operational effectiveness of emergency control equipment
- apply emergency prevention principles
- implement emergency prevention solutions
- implement maintenance auditing and fault reporting procedures
- report emergency prevention problems and suggestions for correction

Required Knowledge

- characteristics, use and limitations of workplace emergency procedures and emergency control equipment
- maintenance requirements of workplace emergency procedures and emergency control equipment
- principles of emergency prevention
- relevant legislation and standards
- typical applications of emergency prevention

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to ensure compliance of workplace emergency procedures, emergency control structures, equipment and other resources with relevant standards and statutory requirements.

Consistency in performance

Competency should be demonstrated over time with a range of emergencies that could be expected in the workplace.

Context of and specific resources for assessment

Context of assessment

Competency should be assessed in the workplace or in a simulated workplace.

Specific resources for assessment

Access is required to:

- scenarios that reflect a range of emergency situations that may be expected in the workplace
- workplace emergency management plan
- workplace emergency procedures

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- emergency control organisation policy documents
- emergency planning committee policy documents

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 in the Performance Criteria is detailed below.

Emergency prevention measures may include:

- emergency control equipment
- emergency evacuation systems
- emergency protection systems

Emergency control equipment may include:

- communications equipment
- escape equipment
- fire/smoke detection, alarm, mitigation and suppression systems
- first-aid kits
- forcible entry tools
- initial response firefighting equipment
- isolation barriers
- personal protection kits
- shower and eyewash
- spill control kits/equipment

Situations that could lead to workplace emergencies may include:

- deficient or ineffective security arrangements
- faults not being reported
- fire/smoke hazards
- poor housekeeping
- unsafe practices
- unsafe storage and handling of dangerous goods and hazardous materials
- unsafe use of electrical or mechanical equipment

Emergency control equipment maintenance requirements must include:

- Australian standards
- industry practices or needs identified as specific to the organisation or workplace
- legislative requirements including codes of practice
- manufacturers' guidelines

Unit Sector(s)

Not applicable.

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PUAWER004B Respond to workplace emergencies

Modification History

Release	TP version	Comments
2	PUA12 V1	Layout adjusted. Application revised.
1	PUA00 V8.1	First release in TGA.

Unit Descriptor

This unit covers the competency required to recognise emergencies in the workplace, to report emergencies and to take appropriate action.

For this unit workplace is defined as the area encompassed by an individual's responsibilities.

This unit has been developed to cover the broad range of emergencies and workplaces as considered in Australian Standard 3745—2010.

Application of the Unit

This unit applies to all personnel within an organisation, within all industries and in all contexts.

This unit places responsibility on individual employees in the workplace to recognise, report and take action during workplace emergency situations. This requirement is consistent with the legislative obligations of employees as prescribed in OHS legislation.

The knowledge and skills gained through the completion of this unit may be applied by all employees across all industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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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 required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for emergency situations	1.1 Current workplace emergency procedures to be used by employees and other workplace occupants are identified and followed. 1.2 Emergency resources in the workplace are identified and located. 1.3 ***Emergency response exercises*** are participated in according to workplace emergency procedures.
2. Report emergencies and potential emergencies	2.1 Emergencies and potential emergencies are identified and reported according to workplace emergency procedures. 2.2 People in any immediate danger from the emergency or potential emergency are alerted according to workplace emergency procedures.
3. Respond to emergency warnings and advice	3.1 ***Emergency warnings*** and advice are responded to according to workplace emergency procedures. 3.2 ***Instructions*** from emergency control response personnel are complied with during an emergency. 3.3 Sources of additional information are identified and information is sought from relevant people if the situation is not clear.
4. Evacuate from the work area	4.1 Need to evacuate from the work area is determined according to the level of immediate danger or instruction issued under the workplace emergency procedures. 4.2 Work area is prepared for evacuation according to workplace emergency procedures and the nature of

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ELEMENT	PERFORMANCE CRITERIA
	the emergency. 4.3 Area of danger is evacuated according to workplace emergency procedures. 4.4 Where it is safe to do so, assistance is provided to ***people who may require assistance.*** 4.5 Evacuation procedures and instructions from emergency control organisation or ***emergency response personnel*** are followed. 4.6 Alternative pathways or methods of evacuation are identified, assessed and chosen according to workplace emergency procedures if usual means of evacuation are blocked or endangered. 4.7 Communication systems are used according to workplace procedures.

Required Skills and Knowledge

This describes the essential skills and knowledge and their level, required for this unit.

Required Skills

- communicate effectively in an emergency situation as outlined in the workplace emergency procedures
- identify an emergency/potential emergency
- adhere to documented workplace emergency procedures

Required Knowledge

- circumstances where evacuation may need to be modified
- emergency reporting systems and procedures used on site
- emergency warning system, signals and instructions used on site
- evacuation alarms and workplace emergency procedures used at the workplace
- location of assembly areas and post-evacuation actions
- location of emergency equipment in the workplace
- procedures for reporting emergencies
- roles, responsibilities and authority of emergency personnel, emergency control organisation and emergency response team
- types of emergencies, the hazards and the evacuation actions associated with each one

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Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessment must confirm the ability to apply workplace procedures; to maintain own safety and the safety of others in emergency situations; and to follow workplace emergency procedures and the advice of emergency control organisation members.

Consistency in performance

Competency should be demonstrated over time with a range of emergencies that could be expected in the workplace including assisting people who may need assistance.

Context of and specific resources for assessment

Context of assessment

Competency should be assessed in the workplace or in a simulated workplace.

Specific resources for assessment

Access to:

- scenarios that reflect a range of emergency situations that may be expected in the workplace
- appropriate emergency resources
- range of communication equipment relevant to the workplace
- workplace emergency procedures and documentation

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 in the Performance Criteria is detailed below.

Emergency response exercises may include

- briefings
- debriefings
- emergency exercises, simulations and reviews
- table/desk top exercises

Emergency warnings may include

- audible/visual alarms
- audible or vibrating pagers
- coded or uncoded public address announcements
- e-mail
- screen alerts
- stench alarms

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People who may require assistance may include	• verbal alert • babies and children • people with a mobility, intellectual, visual, auditory or sensory impairment, either temporary or permanent, who require assistance during an emergency response • people from diverse cultural and linguistic backgrounds • people who are injured • people who are not able to comprehend the instructions given • pregnant women • the elderly
Emergency response personnel may include	• emergency control organisation members • counsellors • emergency response team members • police, fire and emergency services • peer support • recovery team

Unit Sector(s)

Not applicable.

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RIIMPO502D Manage the interaction of heavy and light vehicles and mining equipment

Modification History

Release	Comment
1	This unit replaces RIIMPO502A Manage the interaction of heavy and light vehicles and mining equipment.
2	Editorial corrections; amend reference to Licensing requirements in Unit Application.
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 manage the interaction of heavy and light vehicles and mining equipment in Coal and Metalliferous mining and Extractive.

This unit is appropriate for those working in management 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.

Unit Sector

Coal mining

Extractive

Metalliferous mining

Elements and Performance Criteria

1. Plan and prepare to manage the interaction of heavy and light vehicles and mining	1.1 Access, interpret and apply documentation to manage the interaction of heavy and light vehicles and mining equipment and ensure the work activity is compliant 1.2 Obtain, read, interpret, clarify and confirm work requirements

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equipment	1.3 Identify and address risks, hazards and environmental issues and implement control measures 1.4 Select and wear personal protective equipment appropriate for work activities 1.5 Review the site Traffic Management Plan, policies, plans and standard operating procedures 1.6 Identify and record site requirements for the interaction of transport systems and equipment 1.7 Identify contingencies and define other issues on the job, that will affect the interaction of the transport systems and equipment 1.8 Access and determine, in consultation, the appropriateness of standard operating procedures and revise
2. Manage the interaction of vehicles and mining equipment	2.1 Monitor the implementation and effectiveness of systems, practices and procedures 2.2 Identify, clarify and communicate requirements in the interaction of vehicles and equipment 2.3 Ensure adequate records are collected to allow assessment of safety and efficiency 2.4 Ensure all traffic management procedures are implemented and monitored for effectiveness 2.5 Ensure hazard identification procedures are implemented and monitored for effectiveness 2.6 Manage interaction of vehicles and mining equipment to ensure safety and optimum efficiency
3. Monitor and review interaction of vehicles and mining equipment systems	3.1 Monitor and review, in consultation, the effectiveness of strategies to control identified hazards and contingencies 3.2 Monitor the interaction of vehicles and equipment to ensure safety and optimum efficiency 3.3 Review systems and records, and develop strategies to improve safety and efficiency 3.4 Obtain specialist advice or assistance where required to develop improvement strategies 3.5 Seek approval for major changes to the Traffic Management Plan or Procedures 3.6 Implement, in consultation, the agreed rectification requirements

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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

RIIMPO502A Manage the interaction of heavy and light vehicles and mining equipment

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272

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Assessment Requirements for RIIMPO502D Manage the interaction of heavy and light vehicles and mining equipment

Modification History

Release	Comment
1	This unit replaces RIIMPO502A Manage the interaction of heavy and light vehicles and mining equipment.
2	Editorial corrections; amend reference to Licensing requirements in Unit Application.
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
- implements procedures and techniques for the safe, effective and efficient management of the interaction of heavy and light vehicles and mining equipment including:
  - analysing and resolving system issues
  - developing and implementing monitoring and measuring systems
  - facilitating operational meetings
  - managing the continual improvement of systems
- works effectively with others to undertake and complete the management of the interaction of heavy and light vehicles and mining equipment including:
  - using a range of communications techniques and equipment to convey information to others
  - maintaining clear and legible written records and the reporting systems
  - interpreting and implementing policy
  - consulting with other parties
  - coordinating activities of others
  - managing information
  - applying interpersonal skills

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- demonstrates completion of managing the interaction of heavy and light vehicles and mining equipment that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
  - managing the implementation and continuous improvement of the traffic management system, including:
    - compiling and analysing relevant information and scope of the work
    - identifying viable options and the selection of options that best meet the required outcomes
    - developing and implementing systems and management plans
    - monitoring the implementation of systems
    - rectifying issues to the implementation of systems as authorised

Knowledge Evidence

The candidate must demonstrate knowledge of the following when managing the interaction of heavy and light vehicles and mining equipment:

- managing the limitations of transport monitoring systems
- identifying the functions, capabilities and limitations of vehicles and mine equipment
- reviewing project reporting guidelines
- identifying and communicating roles and responsibilities
- planning for and managing contingencies

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 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,

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- 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

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SIRXQUA001A Develop innovative ideas at work

Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to systematically generate and develop innovative ideas in the workplace.

Application of the Unit

This unit applies to team members who are encouraged develop innovative ideas in the workplace. It requires the skills to interpret or observe a need and develop a detailed idea. It involves the creative generation and discussion of a number of ideas or solutions, accepting positive and negative feedback, and testing ideas in order to establish and present a workable outcome that meets the needs of the end user.

Licensing/Regulatory Information

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

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element	Performance Criteria
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.
1. Interpret the need for innovation.	1.1. Observe the need for ***innovation*** within workplace context. 1.2. Challenge assumptions about products and processes to identify opportunities for innovation. 1.3. Project possible future contexts and environments for the innovation. 1.4. Define ***end user requirements***. 1.5. Identify ***resources and constraints***. 1.6. Research ***factors and ethical considerations*** that may impact on the idea. 1.7. Access relevant ***organisational knowledge***.
2. Generate ideas.	2.1. Conceptualise ideas using a range of ***creative thinking techniques***. 2.2. Apply relevant knowledge to explore a range of approaches. 2.3. Seek ***stimulation from alternative sources***. 2.4. Test ideas against brief and other factors. 2.5. Select preferred option.
3. Collaborate with others.	3.1. Develop ideas in conjunction with ***relevant people***. 3.2. Seek and accept ***feedback*** from relevant people in an appropriate fashion. 3.3. Modify ideas according to feedback. 3.4. Maintain and utilise a ***network of peers*** to discuss ideas.
4. Analyse and reflect on ideas.	4.1. Analyse ideas from different perspectives. 4.2. Use appropriate strategies to capture ***reflections***. 4.3. Examine ideas to ensure they meet context requirements, best practice and future needs. 4.4. Allow time for the development and analysis of ideas.
5. Represent ideas.	5.1. Select an appropriate ***communication technique*** for the target ***audience***. 5.2. Develop the ***presentation of the idea*** with the audience in mind. 5.3. Present the idea to educate and inform the client.

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	5.4. Modify the idea according to client feedback.
6. Evaluate ideas.	6.1. ***Review*** ideas using appropriate ***evaluation methods*** to ensure they meet required needs.
	6.2. Modify ideas as required.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills

- interpersonal skills to:
  - collaborate with others and represent ideas through clear and direct communication
  - ask questions to identify and confirm requirements
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication
  - work within teams
- analytical and lateral thinking skills to examine self and external factors

Required knowledge

- relevant technical knowledge
- broad industry and market knowledge
- organisational culture
- social, environmental and work culture impacts
- principles of innovation

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- interprets the need for innovation in the workplace
- identifies resources and constraints and researches affecting factors when generating innovative ideas
- generates ideas using creative thinking techniques
- tests ideas against brief and other relevant factors
- presents and discusses ideas with relevant people
- seeks feedback and modifies ideas accordingly

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	• analyses and reflects on ideas to ensure they meet end user requirements • presents ideas using appropriate communication methods • reviews and modifies idea using appropriate evaluation methods.
Context of and specific resources for assessment	Assessment must ensure access to: • a real or simulated work environment • relevant documentation, such as store policy and procedures manuals • a range of communication equipment.
Methods of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance in the workplace • third-party reports from a supervisor • a detailed case study • written or verbal questioning to assess knowledge and understanding • review of portfolios of evidence and third-party workplace reports of on-the-job performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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 in the performance criteria is detailed below.

Innovation may include:	• generating new ideas or solutions • developing new uses for old ideas and making them useful or a means of improvement.
End user requirements may refer to:	• who will be using the end product • why the product or process is needed • how will it be used • advantages will it provide • where it will be used.
Resources and constraints may	• time required

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include:	• costs • equipment • human resources • work culture • management practice • technology needed.
Factors and ethical considerations may include:	• aesthetic requirements • functionality • information available • WHS • environmental considerations.
Organisational knowledge may include:	• technical knowledge • information gained from books and audiovisual resources • knowledge from different work areas • informatin from work colleagues • work processes • product • materials • systems • tools • working conditions.
Feedback may be:	• formal or informal • verbal • in writing • in groups • individual.
Creative thinking techniques may include:	• brainstorming • visualising • making associations • building on associations • telling stories • creative writing • lateral thinking games • mind mapping, drawings • six thinking hats • using prompts.
Stimulation from alternative sources may include:	• reading books and industry journals • talking with colleagues and friends

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	• visiting art galleries and museums • going to industry workshops • networks.
Relevant people may include:	• colleagues • team members • supervisors • managers • the client.
Maintaining a ***network of peers*** may include:	• participating in forums • participating in industry training • attending workshops • becoming a member of a network.
Capture of ***reflections*** may include:	• mind mapping • assessing alternatives • drawing comparisons • imagining possible outcomes • imagining best and worst case scenarios.
Communication techniques may include:	• writing a proposal • building a model • showing a film • presenting a talk • preparing a report • drawing a diagram.
The ***audience*** may include:	• external contacts • internal contacts, such as management and other team members • groups or individuals • people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities.
Presentation of ideas may include:	• helping the client visualise and understand the idea • actively listening • asking questions • accepting others opinions • explaining the proposal • clarifying details.
Formal review of the idea may involve:	• checking that the idea can be implemented • that it meets the client and end user needs • best practice

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	• financial requirements • resource requirements.
Evaluation methods may include:	• developing checklists • discussing the process with colleagues or supervisors • writing a report of the outcomes.

Unit Sector(s)

Cross-Sector

Competency field

Quality and Innovation

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SIRXQUA002A Lead a team to foster innovation

Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to lead a workplace team in ways that foster innovative work practices.

Application of the Unit

This unit applies to individuals leading work teams on individual projects or for work in general. The skills encompass the requirements for encouraging innovation within individual team members as well as a team as a whole. They include how to put a team together and keep it working well, how to structure work and monitor progress, how to ensure the team members have the information and skills they need and how to apply innovative work skills to the leadership role.

Licensing/Regulatory Information

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

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element	Performance Criteria
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.
1. Organise team to maximise innovation.	1.1. Analyse the performance requirements for the ***team***. 1.2. Gather ***information*** about ***team members***. 1.3. Acknowledge strengths and weaknesses of individual team members. 1.4. Assign team roles to ensure a match between work requirements and individual team members' capacities. 1.5. Select team members to foster cross-fertilisation of ideas.
2. Organise work assignments within team to facilitate innovative work practices.	2.1. Structure and organise work to enable innovation. 2.2. ***Communicate*** work assignments to team members in ways that ***encourage and reinforce*** team based innovation. 2.3. Allocate tasks and activities to ensure the best use of team skills. 2.4. Ensure work assignments include timelines that allow for innovation.
3. Provide guidance and coaching to team members on innovation in the workplace.	3.1. Encourage team members to work collaboratively on work assignments. 3.2. Encourage team members to share work information, knowledge and experiences in their day-to-day work. 3.3. Encourage team members to seek ***external stimuli and knowledge*** and to set up and maintain networks. 3.4. Provide appropriate ***guidance*** to team members on the use of innovation in the workplace. 3.5. Coach team members to ensure they have the enabling skills to implement innovation in the workplace.
4. Provide a model of innovative work practice.	4.1. Share case studies and examples of the use and benefits of innovative work practices within teams with team members. 4.2. Ensure examples of the way innovative skills can be applied in the workplace are provided by the team leader. 4.3. Demonstrate the ***qualities of an effective team member***, as team leader in working with the team. 4.4. Promote and reinforce the value placed by the organisation on innovation.

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5. Monitor the team's ongoing use of innovative work practices.	5.1. Actively encourage team members to reflect on team activities and opportunities for improvement and innovation. 5.2. Evaluate team activities based on ***feedback*** from team members, management, ***clients*** and other interested people. 5.3. Receive ***suggestions for work improvements*** in a positive manner, and act on them where appropriate. 5.4. Review and record ***evidence*** of the application of innovative work skills, and present findings as appropriate. 5.5. Review the innovation process and discuss and constructively analyse both positive and negative outcomes.
6. Provide feedback on the use of innovative work skills.	6.1. Debrief team members after work and ***training and evaluation*** exercises. 6.2. Discuss feedback from review processes within the team and use it to inform future planning. 6.3. Celebrate successful innovations and ***reward*** the team appropriately. 6.4. Discuss problems in the use of innovation in a constructive way.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills

- interpersonal skills to:
  - communicate work assignments
  - provide guidance and coaching and provide feedback through clear and direct communication
  - ask questions to identify and confirm requirements
  - share information
  - give instructions
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication
- leadership skills to:
  - ability to apply innovative work skills in own work
  - motivate team
  - encourage innovation
  - apply conflict resolution techniques
  - apply counselling and consoling techniques
  - match staff competencies to task requirements

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Required knowledge

- innovative work skills
- leadership principles
- techniques for evaluating team performance
- an understanding of group dynamics in a team
- coaching and learning principles

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organises team to maximise innovation, including gathering information on team members, assigning team roles and selecting team members • organises work assignments within team to foster innovation • provides guidance and coaching to team members on innovation in the workplace • provides a model of innovative work practice • monitors the team's ongoing use of innovative work practice.
Context of and specific resources for assessment	Assessment must ensure access to: • a retail work environment • relevant documentation, such as store policy and procedures manuals • a range of communication equipment • a team.
Methods of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance in the workplace • third-party reports from a supervisor • written or verbal questioning to assess knowledge and understanding • review of portfolios of evidence and third-party workplace reports of on-the-job performance.

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Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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 in the performance criteria is detailed below.

Team may include:	• small work team • store team • corporate team.
Information may include:	• work preferences • past jobs • interests • working styles • lifestyle preferences.
Team members may:	• come from a variety of social, cultural or ethnic backgrounds • vary in literacy and numeracy skills • vary in competencies.
Methods used to ***communicate*** may include:	• writing a proposal • building a model • showing a film • presenting a talk • preparing a report • drawing a diagram.
Ways to ***encourage and reinforce*** team-based innovation may include:	• supportive communication • allowing follow-through with ideas • providing enough but not too much guidance and structure • providing training and learning opportunities.
External stimuli and knowledge may come from:	• technical experts • other organisations • journals • the internet • networks.
Guidance may include:	• coaching • mentoring • counselling

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	• skills training • modelling.
Qualities of an effective team member may include capacity to be:	• fair • responsible • collaborative • reflective • sympathetic • equitable • hardworking.
Feedback may be sought and given:	• verbally • in writing • through presentations • at informal and formal meetings.
Clients may include:	• new and existing clients • internal or external clients • customers with a range of social, cultural and ethnic backgrounds and physical and mental abilities • customers with routine or special needs.
Evidence may include:	• feedback from team members or other staff • feedback from clients or work-based managers • work-related statistics and reports.
Suggestions for work improvements may be received from:	• supervisors • team members • peers • clients • the learners • subject experts.

Training and evaluation may:	• relate to:
	  • existing staff competencies
	  • level of competencies required by staff
	• be supervised by:
	  • supervisor or manager
	  • training coordinator
	  • external consultant.

Rewards and promotion of innovation may include:	• positive feedback presentation to peers and higher management • prizes • certificates • positive reinforcement through articles in newsletters.

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Unit Sector(s)

Cross-Sector

Competency field

Quality and Innovation

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TAEASS301B Contribute to assessment

Modification History

Version	Comments
TAEASS301B	Released with *TAE10 Training and Education Training Package version 2.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to contribute to the assessment process.

Application of the Unit

This unit typically applies to a person with technical or vocational expertise who is in a supervisory or mentoring/coaching work role and for whom collecting evidence for assessment is an adjunct to principal work responsibilities.

This unit is performed under the following conditions:

- the necessary assessment tools and assessment resources to guide the evidence collection process have been provided
- any adjustments to tools are determined by the qualified assessor (as defined by the Australian Quality Training Framework and the assessor requirements of the relevant training package), who provides guidance and supervision.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

ELEMENT	PERFORMANCE CRITERIA

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ELEMENT	PERFORMANCE CRITERIA
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. Clarify role and responsibilities in the assessment process	1.1 Discuss and confirm ***purpose of assessment*** with ***relevant people***
	1.2 Discuss and confirm ***benchmarks for assessment*** with qualified assessor
	1.3 Access, read and clarify ***assessment plan*** with qualified assessor
	1.4 Discuss and agree with qualified assessor the specific responsibilities in gathering evidence and types of evidence to be gathered
2. Confirm organisational arrangements for evidence gathering	2.1 Access and confirm relevant ***assessment system policies and procedures;*** organisational, legal and ethical requirements; and other relevant advice on assessment
	2.2 Clarify nominated ***assessment tools*** and methods for collecting evidence with qualified assessor, to ensure that procedures to be followed and instruments to be used are clear
	2.3 Discuss and confirm with relevant people ***assessment context,*** including candidate's characteristics and any need for ***reasonable adjustments***
	2.4 Confirm and arrange ***resource requirements*** in consultation with relevant people
3. Collect evidence in accordance with the assessment plan	3.1 Explain assessment process to candidate, including the different responsibilities of the parties involved, and refer any candidate issues or concerns to qualified assessor prior to undertaking assessment activities
	3.2 Use ***assessment instruments*** to gather quality evidence within available time and resources, according to organisational, legal and ethical requirements
4. Record and report findings	4.1 Organise and provide evidence to the qualified assessor in a format suitable for analysis according to assessment system policies and procedures

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	4.2 Actively seek feedback from the qualified assessor on whether evidence-gathering activities meet the principles of assessment and whether evidence collected meets the rules of evidence 4.3 Document areas for improvement in collecting evidence, for future assessment activities

Required Skills and Knowledge

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

Required skills

- observation skills to observe candidate performance
- cognitive and interpretation skills to ensure collection of valid and reliable evidence
- organisational skills to collect evidence
- time-management skills to schedule assessment events and activities
- literacy skills to:
  - read and interpret relevant information
  - prepare required documentation and collate evidence in required format
- communication skills to:
  - discuss evidence-gathering processes with practitioners and candidates
  - provide constructive and supportive feedback
  - ask appropriate questions to clarify and confirm instructions for evidence gathering
  - provide clear and concrete options and advice.

Required knowledge

- competency-based assessment, including:
  - criterion referenced
  - competency standards as the benchmarks for assessment
  - competency-based reporting
- principles of assessment
- rules of quality evidence
- different purposes of assessment
- diversity of assessment contexts
- evidence, including different types of evidence
- evidence-gathering methods – what are assessment methods and different types of methods
- purpose and features of assessment tools and assessment plans
- potential barriers and processes relating to evidence-gathering procedures and assessment processes
- organisational assessment system policies and procedures relevant to this unit of competency

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- technical or subject area being assessed
- cultural sensitivity and equity considerations
- relevant policy, legislation, codes of practice and national standards, including commonwealth and state or territory legislation, that may affect training and assessment in the vocational education and training sector
- OHS relating to the work role, and OHS considerations to be included in collecting evidence, including:
  - hazard identification and risk control measures
  - requirements for reporting hazards and incidents
  - emergency procedures
  - procedures for use of relevant personal protective equipment
  - safe use of relevant equipment
  - sources of OHS information
  - role of key workplace personnel
  - responsibilities of learners.

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	Evidence of the ability to: • carry out a minimum of three evidence-gathering activities, with different candidates for each activity • present documentation of the evidence in a clear and concise manner • present documented feedback from others involved in the assessment.
Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided.
Method of assessment	
Guidance information for assessment	

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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.

Purpose of assessment may be:	• recognise current existing competency of candidates • determine if competency has been achieved following learning • establish candidate progress towards achievement of competence • determine language, literacy and numeracy needs of candidate • certify competence through a Statement of Attainment • establish progress towards a qualification • determine training gaps of candidate • measure work performance • classify employee and support career progression • meet organisational requirements for work, such as operating equipment or developing new skills • satisfy licensing or regulatory requirements.
Relevant people must include:	• qualified assessors • candidates.
Benchmarks for assessment:	• refer to criteria against which candidate is assessed • may be a competency standard/unit of competency, assessment criteria of course curricula, performance specifications, or product specifications.
Assessment plan must include:	• purpose and aims of assessment • context of assessment • relevant benchmarks for assessment • other assessment information and documentation identified as relevant.
Assessment system policies and procedures may include:	• candidate selection • rationale and purpose of competency-based assessment • assessment records, data management and information management • recognition of current competency, recognition of prior learning and credit arrangements.
Assessment tools include:	• the learning or competency unit(s) to be assessed • the target group, context and conditions for the assessment • the tasks to be administered to the candidate • an outline of the evidence to be gathered from the candidate • the evidence criteria used to judge the quality of performance

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	(i.e. the assessment decision-making rules) • the administration, recording and reporting requirements • the evidence of how validity and reliability have been tested and built into the design and use of the tool.
Assessment context may include:	• environment in which assessment will be carried out • relationship between units of competency and candidate's workplace • time period over which assessment takes place.

Reasonable adjustments may include:	• taking into account candidate's language, literacy and numeracy requirements
	• providing personal support services, such as arranging for:
	  • member of the community to accompany the candidate
	  • reader
	  • interpreter
	  • attendant carer
	  • scribe
	• using adaptive technology or special equipment
	• providing flexible assessment sessions to allow for such things as fatigue or administering of medication
	• format of assessment materials, such as:
	  • in Braille
	  • in first language
	  • use of audiotape or videotape
	• making adjustments to the physical environment
	• revising proposed assessment methods and instruments
	• considering age and gender
	• considering cultural beliefs, traditional practices and religious observances.

Resource requirements may include:	• resources specific to evidence-gathering activities • access to assessors • access to policy and procedures • access to subject and technical experts • OHS requirements • plant, equipment and technology.

Assessment instruments may include:	• instruments developed by an assessor as part of formative or summative assessment activities, including:
	  • profiles of acceptable performance measures
	  • templates and proformas
	  • specific questions or activities
	  • evidence and observation checklists
	  • checklists for the evaluation of work samples

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	• recognition portfolios • candidate self-assessment materials • instruments developed elsewhere that have been modified by the assessor for use with a particular client group.

Unit Sector(s)

Assessment

Custom Content Section

Not applicable.

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TAEDEL301A Provide work skill instruction

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct individual and group instruction and demonstrate work skills, using existing learning resources in a safe and comfortable learning environment. The unit covers the skills and knowledge required to determine the success of both the training provided and one's own personal training performance. It emphasises the training as being driven by the work process and context.

Application of the Unit

Application of the unit	This unit supports a wide range of applications across any workplace setting and so can be used by any organisation. Its use is not restricted to training organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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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. 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 and demonstration objectives*** and seek assistance if required 1.4. Access and review relevant ***learning resources*** and ***learning materials*** for suitability and relevance, and seek assistance to interpret the contextual application 1.5. Organise access to necessary equipment or physical resources required for instruction and demonstration 1.6. Notify learners of ***details*** regarding the implementation of the learning program and/or delivery plan
2. Conduct instruction and demonstration	2.1. Use interpersonal skills with learners to establish a safe and comfortable learning environment 2.2. Follow the learning program and/or delivery plan to cover all learning objectives 2.3. Brief learners on any ***OHS procedures*** and requirements prior to and during training 2.4. Use ***delivery techniques*** to structure, pace and enhance learning 2.5. Apply ***coaching*** techniques to assist learning 2.6. Use communication skills to provide information,

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ELEMENT	PERFORMANCE CRITERIA
	instruct learners and demonstrate relevant work skills 2.7. Provide opportunities for practice during instruction and through work activities 2.8. Provide and discuss feedback on learner performance to support learning
3. Check training performance	3.1. Use ***measures*** to ensure learners are acquiring and can use new technical and generic skills and knowledge 3.2. Monitor learner progress and outcomes in consultation with learner 3.3. Review relationship between the trainer/coach and the learner and adjust to suit learner needs
4. Review personal training performance and finalise documentation	4.1. Reflect upon personal performance in providing instruction and demonstration, and document strategies for improvement 4.2. Maintain, store and secure learner records according to organisational and legal requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills

• verbaland non-verbal communication techniques, such as:
  • asking relevant and appropriate questions
  • providing explanations
  • demonstrating
  • using listening skills
  • providing information clearly
• safety skills to implement OHS requirements, by acting and responding safely in order to:
  • identify hazards
  • conduct prestart-up checks if required
  • observe and interpret learner behaviour that may put people at risk
• time-management, skills to:

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REQUIRED SKILLS AND KNOWLEDGE

- ensure all learning objectives are covered
- pace learning

- reflection skills in order to:
  - identify areas for improvement
  - maintain personal skill development
- literacy skills to:
  - complete and maintain documentation
  - read and follow learning programs and plans
  - read and analyse learner information
- technology skills to operate audio-visual and technical equipment
- interpersonal skills to:
  - engage, motivate and connect with learners
  - provide constructive feedback
  - maintain appropriate relationships
  - establish trust
  - use appropriate body language
  - maintain humour
  - demonstrate tolerance
  - manage a group
  - recognise and be sensitive to individual difference and diversity
- observation skills to:
  - monitor learner acquisition of new skills, knowledge and competency requirements
  - assess learner communication and skills in interacting with others
  - identify learner concerns
  - recognise learner readiness to take on new skills and tasks

Required knowledge

- learner characteristics and needs
- content and requirements of the relevant learning program and/or delivery plan
- sources and availability of relevant learning resources and learning materials
- content of learning resources and learning materials
- training techniques that enhance learning and when to use them
- introductory knowledge of learning principles and learning styles
- key OHS 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

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REQUIRED SKILLS AND KNOWLEDGE
procedures • risk controls for the specific learning environment

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	Assessment must address the scope of this unit and reflect all components of the unit. A range of appropriate assessment methods and evidence-gathering techniques must be used to determine competency. A judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to:
	• carry out aminimum of three training sessions, involving demonstrating and instructing particular work skills for different groups; with each session addressing:
	  • different learning objectives
	  • a range of techniques and effective communication skills appropriate to the audience.

Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided.
Method of assessment	
Guidance information for assessment	For further information about assessment of this and other TAE units, refer to relevant implementation guidance published on the IBSA website (www.ibsa.org.au).

Range Statement

RANGE STATEMENT

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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.	
Learner characteristics may include:	• language, literacy and numeracy levels • learning styles • past learning and work experiences • specific needs • workplace culture.
Safe learning environment may include:	• exit requirements • personal protective equipment • safe access • safe use of equipment.

Instruction and demonstration objectives may include:	• competencies to be achieved
	• generic and technical skills, which may be:
	  • provided by the organisation
	  • developed by a colleague
	  • individual or group objectives
	  • learning outcomes.

Learning resources may include:	• any material used to support learning, such as:
	  • learner and user guides
	  • trainer and facilitator guides
	  • example training programs
	  • specific case studies
	  • professional development materials
	  • assessment materials
	• a variety of formats
	• those produced locally
	• those acquired from other sources.

Learning materials may include:	• handouts for learners • materials sourced from the workplace, e.g. workplace documentation, operating procedures, and specifications.
Details may include:	• location and time • outcomes of instruction or demonstration • reason for instruction or demonstration • who will be attending instruction session.

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RANGE STATEMENT	
OHS procedures may include:	• emergency procedures • hazards and their means of control • incident reporting • use of personal protective equipment • safe work practices • safety briefings • site-specific safety rules.
Delivery techniques may include:	• coaching • demonstration • explanation • group or pair work • providing opportunities to practise skills and solve problems • questions and answers.
Coaching may include:	• learning arrangements requiring immediate interaction and feedback • on-the-job instruction and 'buddy' systems • relationships targeting enhanced performance • short-term learning arrangements • working on a one-to-one basis.
Measures may include:	• informal review or discussion • learner survey • on-the-job observation • review of peer coaching arrangements.

Unit Sector(s)

Unit sector	Delivery and facilitation

Competency field

Competency field	

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Co-requisite units

Co-requisite units		

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TAEDEL401A Plan, organise and deliver group-based learning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, organise and deliver training for individuals within a group.

Application of the Unit

Application of the unit	This unit typically applies to a person working as an entry-level trainer, teacher or facilitator in or with a training and assessment organisation. The person will be working from a learning program developed by someone else, and structuring the learning around that program.

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.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 1.4. Confirm personal role and responsibilities in planning and delivering training with relevant personnel
2. Prepare session plans	2.1. Refine existing learning objectives according to program requirements and specific needs of individual learners 2.2. Develop ***session plans*** and document these for each segment of the learning program 2.3. Use knowledge of learning principles and theories to generate ideas for managing session delivery
3. Prepare resources for delivery	3.1. Contextualise existing learning materials to meet the needs of the specific learner group 3.2. Finalise learning materials and organise facility, technology and equipment needs in time for delivery of learning sessions 3.3. Confirm overall delivery arrangements with relevant personnel
4. Deliver and facilitate training sessions	4.1. Conduct each session according to session plan, modified where appropriate to meet learner needs 4.2. Use the diversity of the group as another resource to

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ELEMENT	PERFORMANCE CRITERIA
	support learning 4.3. Employ a range of delivery methods as training aids to optimise learner experiences 4.4. Demonstrate effective facilitation skills to ensure effective participation and group management
5. Support and monitor learning	5.1. Monitor and document learner progress to ensure outcomes are being achieved and individual learner needs are being met 5.2. Make adjustments to the delivery sessions to reflect specific needs and circumstances 5.3. Manage ***inappropriate behaviour*** to ensure learning can take place 5.4. Maintain and store learner records according to organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- presentation skills to ensure delivery is engaging and relevant, including:
  - synthesising information and ideas
  - preparing equipment, such as data projectors and computer presentation applications
  - speaking with appropriate tone and pitch
  - using language appropriate to audience
  - encouraging and dealing appropriately with questions
- group facilitation skills to ensure that:
  - every individual has an opportunity for participation and input
  - group cohesion is maintained
  - behaviour that puts others at risk is observed, interpreted and addressed
  - discussion and group interaction are enhanced
- conflict resolution and negotiation skills to:
  - identify critical points, issues, concerns and problems
  - identify options for changing behaviours
- oral communication and language skills to:

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REQUIRED SKILLS AND KNOWLEDGE
• motivate learners to transfer skills and knowledge • engage with the learner • interpersonal skills to maintain appropriate relationships and ensure inclusivity • observation skills to monitor individual and group progress
Required knowledge

• introductory knowledge of learning theories
• sound knowledge of learning principles
• sound knowledge of learner styles
• industry area and subject matter of the delivery
• learner group profile, including characteristics and needs of individual learners in the group
• content and requirements of the learning program and/or delivery plan
• different delivery methods and techniques appropriate to face-to-face group delivery
• techniques for the recognition and resolution of inappropriate behaviours
• behaviours in learners that may indicate learner difficulties
• organisational record-management systems and reporting requirements
• evaluation and revision techniques
• specific resources, equipment and support services available for learners with special needs
• relevant policy, legal requirements, codes of practice and national standards, including commonwealth and state or territory legislation that may affect training and assessment in the vocational education and training sector
• OHS relating to the facilitation of group-based learning, including:
  • assessment and risk control measures
  • reporting requirements for hazards
  • safe use and maintenance of relevant equipment
  • emergency procedures
  • sources of OHS information
  • role of key workplace persons
• policies and procedures relevant to the learning environment

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

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	Assessment must address the scope of this unit and reflect all components of the unit. Arange of appropriate assessment methods and evidence-gathering techniques must be used to determine competency. A judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to:
	• facilitate group-based learning by preparing and delivering a series of training sessions, including:
	  • at least two consecutive sessions, of a duration commensurate with a substantive training session (e.g. 40-60 minutes), that follow one of the learning program designs
	  • at least one session delivered to a different learner group, with evidence of how the characteristics and needs of this group were addressed
	• identify and respond to diversity and individual needs
	• access and use documented resources and support personnel to guide inclusive practices.

Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided. Assessment must ensure access to: • training products, such as training packages and accredited course documentation.
Method of assessment	
Guidance information for assessment	For further information about assessment of this and other TAE units, refer to relevant implementation guidance published on the IBSA website (www.ibsa.org.au).

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
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.	

Learning program documentation may include:	• competencies or other benchmarks to be achieved
	• for each chunk or segment of the learning program:
	  • specific learning outcomes derived from the benchmarks
	  • overview of content to be covered
	  • learning resources, learning materials and activities
	  • delivery methods
	• number and duration of training sessions or classes required, and overall timelines
	• OHS issues to be addressed in delivery
	• identification of assessment points to measure learner progress
	• assessment methods and tools to be used to collect evidence of competency, where assessment is required.

Session plans may include:	• outline of objectives and content to be addressed • plan of delivery methods and learning activities to be used within the session • timelines and duration for each learning activity • formative assessment points and opportunities • learning materials required.
Inappropriate behaviour may include:	• violent or inappropriate language • verbal or physical abuse or bullying • insensitive verbal or physical behaviour towards other learners or the trainer/facilitator, including cultural, racial, disability or gender-based insensitivities • dominant or overbearing behaviour • disruptive behaviour • non-compliance with safety instructions.

Unit Sector(s)

Unit sector	Delivery and facilitation

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Competency field

Competency field	

Co-requisite units

Co-requisite units		

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TAEDEL402A Plan, organise and facilitate learning in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, organise and facilitate learning for individuals in a workplace.

Application of the Unit

Application of the unit	This unit typically applies to a person working as an entry level trainer, teacher or facilitator, team leader or workplace supervisor, or any employee responsible for guiding learning through work.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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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. Establish effective work environment for learning	1.1. Establish and agree upon objectives and scope of the work-based learning 1.2. Analyse work practices and routines to determine their effectiveness in meeting established learning objectives 1.3. Identify and address ***OHS implications*** of using work as the basis for learning
2. Develop a work-based learning pathway	2.1. Address ***contractual requirements*** and responsibilities for learning at work 2.2. Arrange for integration and monitoring of external learning activities with the ***work-based learning pathway*** 2.3. Obtain agreement from relevant personnel to implement the work-based learning pathway
3. Establish the learning-facilitation relationship	3.1. Identify context for learning and individual's learning style 3.2. Select appropriate technique or process to facilitate learning and explain the basis of the technique to learner 3.3. Develop, document and discuss ***individualised learning plan*** with learner 3.4. Access, read and interpret documentation outlining the OHS responsibilities of the various parties in the

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ELEMENT	PERFORMANCE CRITERIA
	learning environment 3.5. Monitor supervisory arrangements appropriate to learner's levels of knowledge, skill and experience to provide support and encouragement and ensure learner's health and safety
4. Implement work-based learning pathway	4.1. Sequence introduction of workplace tasks, activities and processes to reflect the agreed work-based learning pathway 4.2. Explain objectives of work-based learning and the processes involved to learner 4.3. Encourage learner to take responsibility for learning and to self-reflect 4.4. Develop techniques that facilitate learner's transfer of skills and knowledge
5. Maintain and develop the learning/facilitation relationship	5.1. Prepare for each session 5.2. Structure learning activities to support and reinforce new learning, build on strengths, and identify areas for further development 5.3. Observe learner cues and change approaches where necessary to maintain momentum 5.4. Practise ***ethical behaviour*** at all times 5.5. Monitor effectiveness of the learning/facilitation relationship through regular meetings between the parties
6. Close and evaluate the learning/facilitation relationship	6.1. Carry out the closure smoothly, using appropriate interpersonal and communication skills 6.2. Seek feedback from learner on the outcomes achieved and value of the relationship 6.3. Evaluate and document process, including ***impact***, ***self evaluation and reflection***, and file according to legal and organisational requirements
7. Monitor and review the effectiveness of the work-based learning pathway	7.1. Document work performance and learning achievement and keep records according to organisational requirements 7.2. Evaluate effectiveness of the work-based pathway against the objectives, processes and techniques used 7.3. Recommend improvements to work-based practice in light of the review process

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- oral communication and language skills to:
  - motivate the learner
  - transfer skills and knowledge
- interpersonal skills to maintain appropriate relationships
- observation skills to monitor individual progress
- literacy skills to:
  - read and interpret organisational documents, legal documents and contracts
  - complete and maintain documentation
- organisational skills to provide guidance and feedback to individuals
- communication skills, including:
  - using effective verbal and non-verbal language
  - using critical listening and questioning techniques
  - giving constructive and supportive feedback
  - assisting learners to paraphrase advice or instructions back to the trainer/facilitator
  - providing clear and concrete options and advice
  - using appropriate industry/profession terminology and language
  - ensuring language, literacy and numeracy used is appropriate to learners

Required knowledge

- systems, processes and practices within the organisation where work-based learning is taking place
- operational demands of the work and impact of changes on work roles
- organisational work culture, including industrial relations environment
- systems for identifying skill needs
- introductory knowledge of different learning styles and how to encourage learning in each, for example:
  - visual learners
  - audio learners
  - kinaesthetic learners
  - theoretical learners
- relevant policy, legislation, codes of practice and national standards that may affect training and assessment in the vocational education and training sector
- OHS relating to the work role, including:
  - hazards relating to the industry and specific workplace

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REQUIRED SKILLS AND KNOWLEDGE
• reporting requirements for hazards and incidents • specific procedures for work tasks • safe use and maintenance of relevant equipment • emergency procedures • sources of OHS information

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	Assessment must address the scope of this unit and reflect all components of the unit. Arange of appropriate assessment methods and evidence-gathering techniques must be used to determine competency. A judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to:
	• prepare and facilitate work-based learning
	• provide evidence of a minimum of two examples of developing work-based learning pathways, that include:
	  • identifying needs for learning
	  • analysing work practices, work environment and work activities
	  • organising and allocating work in a way that reflects learning needs and provides effective learning opportunities through work processes
	• provide a minimum of two examples of a learning facilitation relationship being conducted:
	  • with different individuals
	  • demonstrating communication skills and flexibility
	  • demonstrating one or more of the processes or techniques identified.

Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be

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EVIDENCE GUIDE	
	provided. Assessment must ensure access to information about work activities.
Method of assessment	
Guidance information for assessment	For further information about assessment of this and other TAE units, refer to relevant implementation guidance published on the IBSA website (www.ibsa.org.au).

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.	
OHS implications may include:	• OHS obligations • workplace OHS policies and procedures • ensuring work practices, routines and proposed changes do not pose a risk to learners and others.
Contractual requirements may include:	• training plans under apprenticeships/traineeships • requirements of government-funded training programs, such as Workplace English Language and Literacy (WELL).
Work-based learning pathway may include:	• identifying specific goals for work-based learning • identifying job tasks or activities to be included in learning process • appropriate sequencing of job tasks/activities to reflect learner incremental development • direct guidance and modelling from experienced co-workers and experts • opportunities for practice.
Individualised learning plan may include:	• information about individual's learning style, learner characteristics, and the context for learning • clear boundaries and expectations of the learning/facilitation relationship • documented equity or additional support needs for the

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RANGE STATEMENT	
	learner • performance benchmarks to be achieved • activities and processes which together will achieve the benchmarks.
Ethical behaviour includes:	• trust • integrity • privacy and confidentiality of the session • following organisational policies • knowing own limitations • having a range of other intervention referrals ready when needed • honesty • fairness to others.
Impact may be:	• successful achievement, rate of achievement, or lack of achievement of identified goals • achievement of other outcomes as a result of the relationship • development of new goals • new or increased motivation to learn • greater capacity to learn • increase in learner's self-confidence.

Self-evaluation and reflection may include:	• asking critical questions about:
	  • own ability
	  • what worked or didn't work
	  • how the relationship building process could be improved
	• reviewing records and journals on sessions and critically evaluating own performance
	• reviewing feedback from learner and identifying critical aspects and areas for improvement.

Unit Sector(s)

Unit sector	Delivery and facilitation

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Competency field

Competency field	

Co-requisite units

Co-requisite units		

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TAEDEL404A Mentor in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish and develop a professional mentoring relationship with a learner, in particular an apprentice or trainee employed by, or undertaking work placement in, a workplace. It includes establishing the need for mentoring, developing a mentoring plan/framework, facilitating and monitoring the mentoring relationship, and evaluating the effectiveness of mentoring.

Application of the Unit

Application of the unit	This unit typically applies to workplace supervisors or other work colleague with responsibility for mentoring in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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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. Develop a mentoring plan	1.1. Identify scope and boundaries of the ***mentoring*** relationship according to organisational procedures 1.2. Establish ***ground rules*** and negotiate realistic expectations 1.3. Establish and maintain confidentiality of the relationship in accordance with ***legislation***, ***policy and procedures***
2. Facilitate mentoring relationship	2.1. Develop learner's confidence, self-esteem, respect and trust in the mentoring relationship 2.2. Share personal experiences and knowledge with the person being mentored according to agreed objectives 2.3. Support the person being mentored to develop and use skills in problem solving and decision making 2.4. Use personal and professional networks to assist the person being mentored 2.5. Provide information, guidance and constructive guidance to enhance engagement in the workplace 2.6. Use ***techniques for resolving differences*** without damaging the relationship, and obtain assistance according to organisational policy and procedures
3. Monitor mentoring relationship	3.1. Provide planning assistance and guidance as requested by the person being mentored in a form

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ELEMENT	PERFORMANCE CRITERIA
	and style to suit their requirements 3.2. Provide feedback to the person being mentored on progress towards achieving the expectations and goals of the mentoring process 3.3. Recognise and discuss changes in the ***mentoring relationship*** with appropriate ***stakeholders*** 3.4. Negotiate and manage closure of the mentoring arrangement once objectives have been met
4. Evaluate effectiveness of mentoring	4.1. Establish and discuss ***benefits*** gained from the mentoring process 4.2. Reflect on and articulate the personal benefits gained from providing mentoring 4.3. Identify and report the outcomes of the mentoring arrangement and the ***benefits to the organisation*** according to organisational policy and procedures to improve the mentoring system or program

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- planning and time-management skills to mentor in a workplace
- oral communication and language skills to motivate learners
- organisational skills to provide guidance and feedback to individuals
- interpersonal skills to:
  - engage in relationship building, including building trust and maintaining confidentiality
  - respond to diversity, including gender and disability
- communication skills to use a range of communication strategies, including listening, questioning, and giving andreceiving feedback
- initiative and enterprise skills to apply procedures relating to OHS and environmentallegislation in the context of workplace mentoring

Required knowledge

- relevant policy, legislation, codes of practice and national standards likely to impact on the provision of workplace mentoring
- training contracts and responsibilities of employer, registered training organisation

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REQUIRED SKILLS AND KNOWLEDGE

(RTO) and funding body
• training plans and responsibilities
• training products and strategies for learning
• mentoring methodologies and strategies
• acceptable behaviour in the mentoring relationship
• equal employment opportunity, equity and diversity principles
• OHS relating to the work role, including:
  • hazards relating to the industry and specific workplace
  • reporting requirements for hazards and incidents
  • specific procedures for work tasks
  • safe use and maintenance of relevant equipment
  • emergency procedures
  • sources of OHS information

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	Assessment must address the scope of this unit and reflect all components of the unit. Arange of appropriate assessment methods and evidence-gathering techniques must be used to determine competency. A judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare a mentoring plan between the mentor and learner that reflects the scope and substance expected within a plan prepared for a learner undertaking a contracted apprenticeship or traineeship • facilitate at least three mentoring sessions • provide information on sessions, including comments and notes from both mentor and learner.
Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be

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EVIDENCE GUIDE	
	provided.
Method of assessment	
Guidance information for assessment	For further information about assessment of this and other TAE units, refer to relevant implementation guidance published on the IBSA website (www.ibsa.org.au).

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.	

Mentoring may include:	• long-term focus on personal growth and learning
	• wide range of learning oriented to:
	  • support
	  • guidance in personal or career growth
	• relationship, not just a procedure or activity
	• one person professionally assisting the career development of another.

Ground rules may include:	• training for mentoring partners • mentoring agreement • active involvement of both partners in the mentoring process.

Legislation, ***policy and procedures*** may include:	• commonwealth and state or territory legislation and regulations, such as:
	  • privacy legislation
	  • equal employment opportunity, anti-discrimination and harassment legislation
	  • OHS legislation
	  • user choice
	• organisational policy, procedures and protocols.

Techniques for resolving differences	• finding a mutually beneficial solution • self-disclosure

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RANGE STATEMENT	
may include:	• inviting discussion • providing explanations • accessing assistance.
Mentoring relationship may include:	• informal workplace development program • formal mentoring process associated with a contracted apprenticeship or traineeship, involving a formal training plan.
Stakeholders may include:	• trainee or apprentice • manager or supervisor • RTO • learning support services, including assistive technology and diagnostic testing • funding organisation • supplier of learning resources.
Benefits may include:	• insights into organisational culture, attitudes and expected behaviours • supportive environment in which successes and failures can be evaluated • networking opportunities • development of workplace competence and self-confidence • recognition and job satisfaction • mutual respect.
Benefits to the organisation may include:	• increased productivity • new competencies in the person being mentored • staff motivation • more committed, involved and responsible learners.

Unit Sector(s)

Unit sector	Delivery and facilitation

Competency field

Competency field	

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Co-requisite units

Co-requisite units		

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TAETAS501B Undertake organisational training needs analysis

Modification History

Version	Comments
TAETAS501B	Released with *TAE10 Training and Education Training Package version 2.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to undertake a training needs analysis (TNA) to identify the training and assessment needs of an organisation.

Application of the Unit

This unit typically applies to those working in roles that require them to work with organisations to identify training needs.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

ELEMENT	PERFORMANCE CRITERIA
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

1. Identify the organisation's needs	1.1 Discuss with relevant staff from the organisation their ***objectives,*** expectations and organisational requirements 1.2 Use appropriate communication and interpersonal skills to develop a professional relationship with the organisation. 1.3 Identify, analyse and address any existing or potential issues that may impact on the organisation's objectives and requirements 1.4 Identify and access resources in accordance with organisational requirements 1.5 Develop a project plan with relevant persons to be negotiated and agreed by the organisation
2. Conduct training needs analysis	2.1 Use reliable, appropriate and efficient methods for collecting information and data on current, emerging and future training needs 2.2 Analyse the organisation's work roles to determine skills and competencies needed for effective performance 2.3 Follow legal, organisational and ethical requirements to gather information and data to assess the current skills and competencies of staff 2.4 Use reliable and valid data analysis methods to determine current and emerging organisational training needs
3. Provide advice to the organisation	3.1 Provide the organisation with clear advice and recommendations on training and assessment needs 3.2 Provide the organisation with ***options*** for meeting identified training needs 3.3 Obtain feedback and comments from the organisation on the suitability and sufficiency of advice and recommendations 3.4 Use legal requirements to process, complete and present final report to the organisation

Required Skills and Knowledge

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

Required skills

- cognitive skills to analyse and interpret research and conceptualise and synthesise issues

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around training needs
- communication and interpersonal skills to consult with client and relevant people, to discuss client needs and provide observations and recommendations for training development
- literacy skills to critically evaluate information and prepare reports providing advice and recommendations
- negotiation and facilitation skills for research, presenting and discussing recommendations and obtaining feedback
- numeracy skills to analyse data and present statistical information
- problem solving skills to apply effective approaches to training needs
- research skills to collect information around training needs, including observation and consultation.

Required knowledge

- competency standards and Training Packages/accredited courses
- Australian Quality Training Framework (AQTF) requirements and standards
- risk identification and management strategies
- industry and enterprise knowledge
- evaluation and research methodologies
- relevant social, political, economic and technological developments
- principles of intellectual property
- training and development strategies
- change management concepts/strategies
- occupational health and safety (OHS) relating to undertaking an organisational training needs analysis.

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	Evidence of the ability to:
	• research, conduct and provide advice through a training needs analysis
	• prepare at least two training needs analyses for one or more organisations
	• collect evidence that demonstrates:
	  • processes that were used to determine the organisation’s needs
	  • details of research methods undertaken to identify

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	suitable training and/or assessment • planning for the training needs analysis • presentations that outline advice and recommendations.
Context of and specific resources for assessment	Evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided.
Method of assessment	
Guidance information for assessment	

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.

Objectives may include:	• improved individual learning outcomes for new or existing staff • access to government training incentives and funding • productivity improvement • developing administration and records management systems • compliance with, or knowledge of, legislative or government regulatory requirements • individualised organisational training and skill requirements.
Options may include:	• developing in-house capacity to meet identified needs • identifying training and/or assessment organisations to meet needs • identifying specific units of competency, qualifications/courses to meet needs • consultancy services.

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Unit Sector(s)

Training advisory services

Custom Content Section

Not applicable.

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TLIE4006A Collect, analyse and present workplace data and information

Modification History

Not Applicable

Unit Descriptor

Unit Descriptor

This unit involves the skills and knowledge required to collect, analyse and present workplace data and information including identifying required information, analysing and preparing information for use, explaining information, and presenting workplace information to others. Licensing, legislative, regulatory or certification requirements are applicable to this unit.

Application of the Unit

Application of the Unit

Data collection, analysis and presentation is carried out as an integral part of operations in the context of the workplace concerned.

Work is performed under general or limited supervision, generally within a team environment. It involves the application of established principles and practice to the collection, analysis and presentation of information and data as part of workplace operations.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Not Applicable

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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 required performance needed to demonstrate achievement of the element. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Identify required information	1.1 Purpose of the information/data collection is identified 1.2 Sources of information are established 1.3 Appropriate information is collected
2 Prepare information for use	2.1 Information is collated and analysed in accordance with workplace procedures 2.2 Processed information is organised and presented in a logical manner 2.3 Checks for accuracy are made
3 Explain information	3.1 Data collection and analysis is explained to others in a way that effectively contributes to the workplace operations 3.2 Outcomes of data/information analysis are presented to others using appropriate presentation modes and resources 3.3 Questions are answered and appropriate clarifications are given
4 Present workplace information	4.1 Processed information is forwarded to appropriate personnel in accordance with workplace procedures 4.2 Processed information is collated and stored in accordance with workplace procedures

Required Skills and Knowledge

REQUIRED KNOWLEDGE AND SKILLS

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REQUIRED KNOWLEDGE AND SKILLS

This describes the essential knowledge and skills and their level required for this unit.

Required knowledge:

- Relevant procedures and duty of care requirements
- Relevant OH&S responsibilities
- Sources of information and data and procedures for processing the information for workplace use
- Protocols and procedures for the collection, analysis and presentation of workplace information and data using relevant technology
- Presentation and communication techniques including an understanding of barriers to effective communication and how to overcome them
- Basic principles of effective presentation and communication of information
- Techniques for communicating effectively with a multilingual persons or persons with a limited ability to speak or understand English
- Typical presentation and communication problems and appropriate action and solutions

Required skills:

- Communicate effectively with others when collecting, analysing and presenting workplace data and information
- Read and interpret instructions and procedures relevant to the collection, analysis and presentation of workplace data and information
- Interpret and follow operational instructions and prioritise work
- Complete documentation related to the collection, analysis and presentation of workplace data and information
- Identify and use required communication and presentation technology
- Work collaboratively with others when collecting, analysing and presenting workplace data and information
- Adapt appropriately to cultural differences in the workplace, including modes of behaviour and interactions with others
- Promptly report and/or rectify any identified problems that may arise when collecting, analysing and presenting workplace data and information in accordance with regulatory requirements and workplace procedures
- Plan own work including predicting consequences and identifying improvements
- Implement contingency plans for unanticipated situations that may arise when collecting, analysing and presenting workplace data and information
- Monitor work activities in terms of planned schedule
- Modify activities depending on differing operational contingencies, risk situations and environments

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Required skills:

- Work systematically with required attention to detail
- Operate and adapt to differences in equipment in accordance with standard operating procedures

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge and skills, the range statement and the assessment guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	• The evidence required to demonstrate competency in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria of this unit and include demonstration of applying:
	  • the underpinning knowledge and skills
	  • relevant legislation and workplace procedures
	  • other relevant aspects of the range statement

Context of and specific resources for assessment	• Performance is demonstrated consistently over a period of time and in a suitable range of contexts
	• Resources for assessment include:
	  • a range of relevant exercises, case studies and/or other simulated practical and knowledge assessment, and/or
	  • access to an appropriate range of relevant operational situations in the workplace
	• In both real and simulated environments, access is required to:
	  • relevant and appropriate materials and equipment, and
	  • applicable documentation including workplace procedures, regulations, codes of practice and operation manuals

Method of assessment	• Assessment of this unit must be undertaken by a registered training organisation • As a minimum, assessment of knowledge must be conducted through appropriate written/oral tests • Practical assessment must occur: • through activities in an appropriately simulated

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EVIDENCE GUIDE

	environment at the registered training organisation, and/or • in an appropriate range of situations in the workplace

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.

Data collection, analysis and presentation will be:	• that required for workplace operations • may occur by day or night and in a variety of work contexts
Customers may be:	• internal or external
Presentation modes may include:	• written documentation • oral reports • group presentations using appropriate technology • completion of standard forms and checklists • routine written reporting • entry of collected/processed information into a computer • participation in workplace discussions
Presentations/communications may involve:	• English-speaking persons • multilingual staff • persons with limited ability to communicate in English
Presentation/communication problems may include:	• misunderstanding • limited ability of others to communicate in English • noisy environments or communications channels • illegible writing or print • use of non-standard vocabulary • incorrect assumption that information has been received and/or correctly understood
Depending on workplace context, consultative processes may involve	• managers • supervisors/team leaders • workplace personnel • clients • private and/or public sector security personnel • police

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RANGE STATEMENT

	• security consultants • visitors • contractors • official representatives • union representatives • industrial relations • OH&S specialists • other professional or technical staff
Depending on the type of organisation concerned and the local terminology used, workplace procedures may include:	• company procedures • enterprise procedures • organisational procedures • established procedures
Presentation/communication may involve the use of a range of technology, including:	• phone • electronic data interchange • fax • email • internet • radio • overhead or computer controlled projector • plain or electronic white board • flip charts • microphone and amplifier • video player and monitor
Information/documentation may include:	• workplace procedures, checklists and instructions • operations manuals • induction documentation • competency standards and training materials • job specifications • manufacturers specifications • HAZCHEM and dangerous/hazardous goods codes • goods identification numbers and codes • manifests, bar codes, goods and container identification • manufacturers specifications • workplace policies • supplier and/or client instructions • material safety data sheets • relevant codes of practice including the national standards for manual handling and the industry safety code • legislation, regulations and related documentation • award, enterprise bargaining agreement, other industrial

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RANGE STATEMENT

	arrangements • standards and certification requirements • quality assurance procedures • emergency procedures
Applicable regulations and legislation may include:	• relevant regulations, standards and codes of practice, including the national standards for manual handling and industry safety codes • dangerous goods and freight regulations and codes • relevant Australian and state/territory standards and certification requirements • relevant Australian and state/territory OH&S legislation • equal employment legislation and related policies • environmental protection regulations

Unit Sector(s)

Not Applicable

Competency Field

Competency Field E - Communication and Calculation

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BSB Business Services Training Package

Modification History

Release Number	Release Date	Comments
Release 1.0	March 2015	Primary release of restructured Training Package This release of the BSB Business Services Training Package contains 61 qualifications, 3O5 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 Leadership and Management qualifications added Managing Diversity qualification added Portfolio Management qualifications added Conveyancing qualifications moved from FNS10

Credit Arrangements

Links

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

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BSBSS00033 Aspiring Supervisor Skill Set

Modification History

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

Description

This skill set is for staff who plan to move into supervisory or team leader roles.

Pathways Information

Units from this skill set can contribute to BSB30114 Certificate III in Business.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBFLM303 Contribute to effective workplace relationships

BSBFLM305 Support operational plan

BSBFLM306 Provide workplace information and resourcing plans

BSBFLM312 Contribute to team effectiveness

Target Group

Entry level supervisors and team leaders.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for people with supervisory or managerial aspirations.

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BSBSS00034 Basic Customer Engagement Skill Set

Modification History

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

Description

This skill set is designed for persons who are seeking to enter the industry and require basic operator skills or are working in a customer engagement centre and require recognition of their current skills.

Pathways Information

These units of competency provide credit towards a range of qualifications, including:

- BSB20214 Certificate II in Customer Engagement
- BSB30214 Certificate III in Customer Engagement

Licensing/Regulatory Information

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

Skill Set Requirements

BSBWHS201 Contribute to health and safety of self and others

BSBCUE205 Prepare for work in a customer engagement environment

BSBCUE203 Conduct customer engagement

BSBITU101 Operate a personal computer

Target Group

Customer Engagement staff.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet basic competency requirements for operators in a customer engagement centre.

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BSBSS00035 Copyright Skill Set

Modification History

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

Description

This skill set is for people who need to manage the protection and commercialisation of original works within an organisation.

Pathways Information

Units from within this skill set can contribute to a number of qualifications, including the BSB40214 Certificate IV in Business, BSB50214 Diploma of Business, BSB50514 Diploma of Franchising and BSB51914 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

BSBIPR401 Use and respect copyright

BSBIPR501 Manage intellectual property to protect and grow business

Target Group

Managers and Leaders.

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for the management of the protection and use of original works within an organisation.

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BSBSS00036 Design Fundamentals Skill Set

Modification History

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

Description

This Skill Set is for individuals working in any industry context who need to develop and apply an appreciation of the design process in improving individual work processes and practices. Good design processes include the application of critical thinking to a range of situations and challenges including product and service requirements arising from particular business or community needs.

Pathways Information

These units of competency provide credit towards a broad range of qualifications in multiple industry and community contexts.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBDES202 Evaluate the nature of design in a specific industry context

BSBCRT101 Apply critical thinking techniques

BSBDES201 Follow a design process

Target Group

Design staff

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet broad industry and community requirements for the development and application of basic design fundamental skills.

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BSBSS00037 Design Protection Skill Set

Modification History

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

Description

This skill set is for people who need to manage the protection and commercialisation of innovative designs within an organisation.

Pathways Information

Units from within this Skill Set can contribute to a number of qualifications, including the BSB40214 Certificate IV in Business, BSB50214 Diploma of Business and BSB50514 Diploma of Franchising.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBIPR404 Protect and use innovative designs

BSBIPR501 Manage intellectual property to protect and grow business

Target Group

Middle Management

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for the management of the protection and use of innovative designs within an organisation.

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BSBSS00038 Franchising Skill Set

Modification History

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

Description

This skill set is for consultants assisting people to buy into a franchise or to franchise their own business operation.

Pathways Information

These units provide credit towards a number of qualifications, including the BSB50514 Diploma of Franchising.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBFRA502 Manage a franchise operation

BSBFRA504 Manage relationships with franchisees

BSBFRA505 Manage closure of a franchise

Target Group

Franchise Managers

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for providing consultancy services to franchisors and franchisees.

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BSBSS00039 Governance Induction Skill Set

Modification History

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

Description

This skill set is for individuals who are new to positions on a board of governance.

Pathways Information

These units provide credit towards the BSB40914 Certificate IV in Governance.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBGOV401 Implement Board member responsibilities

BSBGOV402 Work within organisational structure

BSBGOV403 Analyse financial reports and budgets

Target Group

Board members

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for new Board members.

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BSBSS00040 Innovation Leadership Skill Set

Modification History

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

Description

This skill set is for individuals who will have a leadership role in promoting innovation within the whole organisation or within a division. They may be a Manager of Research, Product Development, or a Divisional Manager.

Pathways Information

Units from this skill set can contribute to a number of qualifications, including BSB40207 Certificate IV in Business, BSB50214 Diploma of Business and BSB40414 Certificate IV in Small Business Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBINN501 Establish systems that support innovation

BSBINN502 Build and sustain an innovative work environment

SIRXQUA002A Lead a team to foster innovation

Target Group

Managers and Leaders

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for individuals who lead innovation at all levels of the workforce.

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BSBSS00041 Innovation Practice Skill Set

Modification History

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

Description

This skill set is for individuals who make a substantial contribution and have a level of ownership of innovation within an organisation.

Pathways Information

Units from this skill set can contribute to a number of qualifications, including BSB30314 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBCMM201 Communicate in the workplace

BSBCRT501 Originate and develop concepts

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for individuals who contribute to an innovative workplace.

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BSBSS00042 Intellectual Property Strategic Management Skill Set

Modification History

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

Description

This skill set is for managers who need to develop strategies for the management and commercialisation of intellectual property.

Pathways Information

Units from within this Skill Set can contribute to a number of qualifications, including the BSB50214 Diploma of Business, BSB50514 Diploma of Franchising and BSB60214 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

BSBIPR501 Manage intellectual property to protect and grow business

BSBIPR601 Develop and implement strategies for intellectual property management

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for developing and managing intellectual property strategies.

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BSBSS00043 Key Management Skill Set

Modification History

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

Description

This skill set is for people newly promoted to the position of supervisor, leading hand or team leader.

Pathways Information

These units provide credit towards a number of qualifications including the BSB42014 Certificate IV in 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

BSBMGT401 Show leadership in the workplace

BSBMGT402 Implement operational plan

BSBLDR403 Lead team effectiveness

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for a supervisor.

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BSBSS00044 Key Recordkeeping Skill Set

Modification History

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

Description

This skill set is for individuals who have operational responsibilities with regards to records and/or recordkeeping systems.

Pathways Information

These units provide credit towards the BSB30814 Certificate III in Recordkeeping.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBRKG305 Review recordkeeping functions

BSBRKG301 Control records

BSBRKG302 Undertake disposal

Target Group

Recordkeeping staff

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for recordkeeping at an operational level within an organisation.

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BSBSS00045 Legal Transcription Skill Set

Modification History

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

Description

This skill set is for individuals providing transcription services to the legal industry.

Pathways Information

These units provide credit towards a number of qualifications including the BSB40214 Certificate IV in Business and the BSB40514 Certificate IV in Business Administration.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADM411 Produce complex texts from audio transcription

BSBITU307 Develop keyboarding speed and accuracy

BSBLEG305 Use legal terminology in order to carry out tasks

BSBRES401 Analyse and present research information

BSBWRT401 Write complex documents

Target Group

Legal administration staff

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for a legal transcription typist.

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BSBSS00046 Managing Innovation Skill Set

Modification History

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

Description

This skill set is for individuals whose role includes fostering innovation at all levels of the workforce.

Pathways Information

Units from this skill set can contribute to a number of qualifications, including BSB40214 Certificate IV in Business, BSB50214 Diploma of Business, and BSB51914 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

BSBINN502 Build and sustain an innovative work environment

BSBINN501 Establish systems that support innovation

BSBIPR402 Protect and use new inventions and innovations

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for fostering innovation at all levels of the workforce.

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BSBSS00047 Medical Transcription Skill Set

Modification History

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

Description

This skill set is for individuals providing transcription services to the medical industry.

Pathways Information

These units provide credit towards a number of qualifications including, the BSB40214 Certificate IV in Business and the BSB40514 Certificate IV in Business Administration.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADM411 Produce complex texts from audio transcription

BSBITU307 Develop keyboarding speed and accuracy

BSBMED301 Interpret and apply medical terminology appropriately

BSBRES401 Analyse and present research information

BSBWRT401 Write complex documents

Target Group

Medical administration staff

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for a medical transcription typist.

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BSBSS00048 Patent Skill Set

Modification History

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

Description

This skill set is for people who need to manage the protection and commercialisation of inventions and innovations within an organisation.

Pathways Information

Units from within this Skill Set can contribute to a number of qualifications, including the BSB40214 Certificate IV in Business, BSB50214 Diploma of Business, BSB50514 Diploma of Franchising and BSB51914 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

BSBIPR402 Protect and use new inventions and innovations

BSBIPR501 Manage intellectual property to protect and grow business

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for the management of the protection and use of inventions and innovations within an organisation.

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BSBSS00049 Small Business Contracting Skill Set

Modification History

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

Description

This skill set is for small business practitioners who are pursuing contracted business opportunities. It may relate to people who operate a small business on a day-to-day basis either as an owner–operator or as an employed operator/manager.

Pathways Information

The BSB units of competency provide credit towards the BSB40414 Certificate IV in Small Business Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB401 Establish legal and risk management requirements of small business

BSBSMB402 Plan small business finances

PSPGOV407B Provide a quotation

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for conducting business via contracted activity.

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BSBSS00050 Small Business Financial Management Skill Set

Modification History

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

Description

This skill set is for small business practitioners who are managing finances for a small business. It may relate to people who are establishing or operating a micro business providing for self-employment.

Pathways Information

BSBSMB304 Determine resource requirements for the micro business provides credit towards the BSB30314 Certificate III in Micro Business Operations.

BSBSMB402 Plan small business finances provides credit towards the BSB40414 Certificate IV in Small Business Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB304 Determine resource requirements for the micro business

BSBSMB402 Plan small business finances

BSBSMB406 Manage small business finances

Target Group

Managers and leaders

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Suggested words for Statement of Attainment

These units of competency meet the industry requirements for financial management.

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BSBSS00051 Small Business Home-Based Business Skill Set

Modification History

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

Description

This skill set is for people who are establishing or operating a micro business providing for self-employment.

Pathways Information

These units of competency provide credit towards the BSB30314 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB304 Determine resource requirements for the micro business

BSBSMB306 Plan a home based business

BSBSMB307 Set up information and communications technology for the micro business

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for establishing or operating a home-based micro business.

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BSBSS00052 Small Business ATSI Corporate Governance Skill Set

Modification History

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

Description

This skill set is for small business practitioners who are involved in Aboriginal and Torres Strait Islander corporate governance. It may relate to people who manage a small business on a day-to-day basis for Aboriginal and Torres Strait Islander (ATSI) organisations.

Pathways Information

BSBATSIM416 Oversee organisational planning provides credit towards the BSB41914 Certificate IV in Business (Governance).

BSBGOV401 Implement Board member responsibilities and BSBGOV402 Work within organisational structure provide credit towards the BSB40914 Certificate IV in Governance.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBATSIM416 Oversee organisational planning

BSBGOV401 Implement Board member responsibilities

BSBGOV402 Work within organisational structure

Target Group

Managers and leaders within Aboriginal and Torres Strait Islander organisations.

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Suggested words for Statement of Attainment

These units of competency meet the industry requirements for providing corporate governance advice within Aboriginal and Torres Strait Islander organisations.

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BSBSS00053 Small Business Intellectual Property Skill Set

Modification History

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

Description

This skill set is for people who need to manage the protection and commercialisation of intellectual property in small business.

Pathways Information

Units from within this Skill Set can contribute to a number of qualifications, including BSB30314 Certificate III in Micro Business Operations, BSB40214 Certificate IV in Business, BSB40414 Certificate IV in Small Business Management and BSB40714 Certificate IV in Franchising.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBIPR405 Protect and use intangible assets in small business

BSBCRT501 Originate and develop concepts

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for the protection of intellectual property in small business.

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BSBSS00054 Small Business Marketing Skill Set

Modification History

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

Description

This skill set is for small business practitioners who are conducting marketing activities. It may relate to people who operate a small business on a day-to-day basis either as an owner–operator or as an employed operator/manager.

Pathways Information

BSBSMB301 Investigate micro business opportunities provides credit towards the BSB30314 Certificate III in Micro Business Operations.

BSBMKG414 Undertake marketing activities and BSBSMB403 Market the small business provide credit towards the BSB40414 Certificate IV in Small Business Management.

BSBMKG401 Profile the market and BSBMKG402 Analyse consumer behaviour for specific markets provide credit towards the BSB41314 Certificate IV in Marketing.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMKG401 Profile the market

BSBMKG402 Analyse consumer behaviour for specific markets

BSBMKG414 Undertake marketing activities

BSBSMB403 Market the small business

BSBSMB301 Investigate micro business opportunities

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Target Group

Marketing staff

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for conducting marketing activities for a small business.

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BSBSS00055 Small Business Operations Preparatory Skill Set

Modification History

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

Description

This skill set is for people who are assisting with small business operations or are intending to start a small business. It may relate to people working in a micro/small business or to people examining the potential for establishing a micro business.

Pathways Information

BSBIND201 Work effectively in a business environment provides credit towards the BSB10114 Certificate I in Business.

BSBWOR204 Use business technology provides credit towards the BSB20114 Certificate II in Business.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBIND201 Work effectively in a business environment

BSBSMB201 Identify suitability for micro business

BSBWOR204 Use business technology

FNSFLT203 Develop knowledge of debt and consumer credit

Target Group

Managers and leaders

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Suggested words for Statement of Attainment

These units of competency meet the industry requirements for providing assistance with the management of a small business.

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BSBSS00056 Small Business Preparatory Skill Set

Modification History

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

Description

This skill set is for people preparing for work in a micro/small business.

Pathways Information

The BSB units of competency provide credit towards the BSB10114 Certificate I in Business.

FNSFLT201A Develop and use a personal budget provides credit towards the BSB30314 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADM101 Use business equipment and resources

BSBITU101 Operate a personal computer

FNSFLT201 Develop and use a personal budget

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for providing preparatory work in small business management.

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BSBSS00057 Trade Mark Skill Set

Modification History

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

Description

This skill set is for people who need to manage the protection and commercialisation of brands and business identity within an organisation.

Pathways Information

Units from within this Skill Set can contribute to a number of qualifications, including the BSB40214 Certificate IV in Business, BSB50214 Diploma of Business and BSB50514 Diploma of Franchising.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBIPR403 Protect and use brands and business identity

BSBIPR501 Manage intellectual property to protect and grow business

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These competencies from the BSB Business Services Training Package meet the industry requirements for the management of the protection and use of brands and business identity within an organisation.

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BSBSS00058 Workforce Development Implementation Skill Set

Modification History

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

Description

Small business owners/operators or someone who has responsibility for developing and skilling that workforce. The skill set is also suitable for individuals working in a medium to large organisation and skills development officers working in an industry sector.

Pathways Information

The units provide credit towards a range of qualifications, including BSB40214 Certificate IV in Business, BSB50214 Diploma of Business, BSB40414 Certificate IV in Small Business management and BSB50614 Diploma of Human Resources Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMGT615 Contribute to organisation development

BSBLED501 Develop a workplace learning environment

BSBHRM602 Manage human resources strategic plan

Target Group

Managers and leaders

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Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for individuals who implement workforce development strategies within an organisation or an industry sector.

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BSBSS00059 Workforce Planning and Development Skill Set

Modification History

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

Description

Small business owners/operators or someone who has responsibility for managing the size and composition of the workforce and retaining and skilling that workforce. The skill set is also suitable for individuals working in a medium to large organisation, or a skills development officer working in an industry sector.

Pathways Information

The units provide credit towards a range of qualifications, including BSB40214 Certificate IV in Business, BSB50214 Diploma of Business, BSB40414 Certificate IV in Small Business Management and BSB50614 Diploma of Human Resources Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBHRM513 Manage Workforce Planning

BSBLDR402 Lead effective workplace relationships

BSBRES401 Analyse and present research information

TAETAS501B Undertake organisational training needs analysis

Target Group

Managers and leaders

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Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for individuals who plan and develop workforce development strategies within an organisation or industry sector.

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BSBSS00060 Energy Efficiency in Business Skill Set

Modification History

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

Description

This skill set is for individuals who contribute to improving energy efficiency in their business operations or work area.

Pathways Information

Units from this skill set can contribute to BSB40414 Certificate IV in Small Business Management.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB405 Monitor and manage small business operations

BSBSMB410 Review and implement energy efficiency in business operations

BSBSMB411 Manage specialist external advisory services

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for improving energy efficiency in a micro or small business, or work area of an organisation.

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BSBSS00061 Cloud Computing and Digital Skills for Business Skill Set

Modification History

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

Description

This skill set is for small business owners who want to build their digital literacy skills and introduce cloud computing and social media tools into their business operations.

Pathways Information

Units from this skill set can contribute to:

- BSB30314 Certificate III in Micro Business Operations
- BSB40414 Certificate IV in Small Business Management

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB412 Introduce cloud computing into business operations

ICTWEB201 Use social media tools for collaboration and engagement

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for introducing cloud computing and social media tools into a micro or small business.

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BSBSS00062 Workplace Supervisor Language, Literacy and Numeracy Skill Set

Modification History

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

Description

This skill set is for Individuals who supervise others in a workplace.

Pathways Information

These units are elective units in the Business Services Training Package. They may be used to provide credit towards BSB41914 Certificate IV in 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

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

Target Group

Managers and leaders

Suggested words for Statement of Attainment

These units meet industry requirements for team leaders, supervisors and mentors providing language, literacy and numeracy support to colleagues.

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BSBSS00063 Team Leader Skill Set

Modification History

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

Description

This Skill Set reflects the role of individuals working as developing and emerging leaders in a range of contexts.

Leadership often begins at the team leader level across a wide range of enterprise and industry contexts. Team leaders communicate effectively, ensure team performance and develop effective relationships in the workplace. Across the breadth of industry, team leaders are responsible for implementing operational plans.

Pathways Information

The units provide credit towards BSB42014 Certificate IV in 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

BSBLDR401 Communicate effectively as a workplace leader

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBMGT402 Implement operational plan

Target Group

Developing team leaders and managers within a broad range of enterprise and industry contexts.

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Suggested words for Statement of Attainment

These units from the BSB Business Services Training Package when used with relevant vocational competencies meet industry requirements for team leaders.

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BSBSS00064 Promoting Diversity Awareness in the Workplace Skill Set

Modification History

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

Description

This Skill Set addresses the skills, knowledge and performance requirements to promote diversity awareness in the workplace.

Pathways Information

The units provide credit towards BSB40214 Certificate IV in Business.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBLDR404 Lead a diverse workforce

BSBINN301 Promote innovation in a team environment

TAEDEL404A Mentor in the workplace

Target Group

Team Leaders and Front Line Managers

Suggested words for Statement of Attainment

These units of competency meet the industry requirements to promote diversity awareness in the workplace.

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BSBSS00065 Implementing Policy for Diversity Skill Set

Modification History

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

Description

This Skill Set addresses the skills, knowledge and performance requirements to implement diversity policy in the workplace.

Pathways Information

The units provide credit towards BSB51914 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

BSBMGT608 Manage innovation and continuous improvement

BSBMGT516 Facilitate continuous improvement

BSBDIV501 Manage diversity in the workplace

BSBMGT520 Plan and manage the flexible workforce

Target Group

Managers and HR Professionals

Suggested words for Statement of Attainment

These units of competency meet the industry requirements to implement diversity policy in the workplace.

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BSBSS00066 Managing Cultural Diversity Skill Set

Modification History

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

Description

This Skill Set focuses on managing organisational cultural diversity.

Pathways Information

The units provide credit towards BSB51914 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

BSBATSIM421 Support a positive and culturally appropriate workplace culture

BSBINN501 Establish systems that support innovation

Target Group

Team Leaders or Front Line Managers

Suggested words for Statement of Attainment

These units of competency meet the industry requirements to manage cultural diversity in the workplace.

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BSBSS00067 Planning Diversity Skill Set

Modification History

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

Description

This Skill Set addresses the skills, knowledge and performance requirements to plan a diversity policy in the workplace.

Pathways Information

The units provide credit towards BSB80314 Graduate Certificate in Leadership Diversity.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBDIV601 Develop and implement diversity policy

BSBLDR804 Influence and shape diversity management

Target Group

High Level Managers and Leaders

Suggested words for Statement of Attainment

These units of competency meet the industry requirements to plan cultural diversity policy in the workplace.

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BSBSS00068 Service Management Skill Set

Modification History

Release	Comments
Release 1	This Skill Set first released with BSB Business Services Training Package Version 1.0

Description

This skill set addresses the skills, knowledge and performance requirements to manage and document business operations and contingencies.

Pathways Information

The units provide credit towards qualifications at Diploma or Advanced Diploma level.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

- BSBRSK501 Manage risk
- BSBFIM601 Manage finances
- BSBMGT617 Develop and implement a business plan

Target Group

This skill set is for staff who hold a management role in an organisation, program or business unit.

Suggested words for Statement of Attainment

These units of competency meet the industry requirements to plan and manage business operations including the determination and management of risks and the financial requirements of an organisation.

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