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BSB Business Services Training Package

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Links

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

BSB10115 Certificate I in Business

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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.

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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

BSBADM101 Use business equipment and resources

BSBIND201 Work effectively in a business environment

BSBCMM101 Apply basic communication skills

BSBITU111 Operate a personal digital device

BSBITU112 Develop keyboard skills

BSBITU211 Produce digital text documents

BSBITU212 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 Release 2	BSB10115 Certificate I in Business Release 1	Updates to codes and titles in the unit list	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 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

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- if not listed below, 2 of the 4 elective units may be selected from either a Certificate I or a Certificate III 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

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

BSBITU211 Produce digital text documents

BSBITU212 Create and use spreadsheets

BSBITU213 Use digital technologies to communicate remotely

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

FNSACC311 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	BSB20115 Certificate II in Business	Updates to codes and titles in the unit list	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
Release 2	Release 1		

Links

Companion 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 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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.

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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

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

BSBITU111 Operate a personal digital device

BSBITU213 Use digital technologies to communicate remotely

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 Release 2	BSB20215 Certificate II in Customer Engagement Release 1	Updates to codes and titles in the unit list	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 5	This qualification first released with BSB Business Services Training Package Version 6.1. Version created to update Elective Unit list.
Release 4	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 2.0. Version created to update codes and titles in unit list.
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

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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.

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

BSBITU306 Design and produce business documents

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BSBITU309 Produce desktop published documents

BSBITU311 Use simple relational databases

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

BSBITU314 Design and produce spreadsheets

BSBITU315 Purchase goods and services online

BSBPRO301 Recommend products and services

BSBPUR301 Purchase goods and services

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWHS332X Apply infection prevention and control procedures to own work activities

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWRK311 Develop self-awareness

BSBWRT301 Write simple documents

BSBXCM301 Engage in workplace communication

BSBXTW301 Work in a team

Qualification Mapping Information

Supersedes and is equivalent to BSB30112 Certificate III in Business

Links

Companion Volume Implementation Guides are available from 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 5	This qualification first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 4	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 2.0. Version created to update codes and titles in unit list.
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

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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
- 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

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BSBCMM301 Process customer complaints

BSBITU213 Use digital technologies to communicate remotely

BSBITU307 Develop keyboarding speed and accuracy

BSBLED301 Undertake e-learning

BSBWOR203 Work effectively with others

BSBWOR301 Organise personal work priorities and development

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

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWHS201 Contribute to health and safety of self and others

BSBWHS307 Apply knowledge of WHS laws in the workplace

BSBWOR201 Manage personal stress in the workplace

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

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

Supersedes and is equivalent to BSB30211 Certificate III in Customer Contact.

Links

Companion Volume Implementation Guides are available from 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 4	This qualification first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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5 elective units, of which:

- all 5 elective units may be selected from the elective units listed below or from 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 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

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

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

BSBITU315 Purchase goods and services online

BSBREL401 Establish networks

BSBSMB201 Identify suitability for micro business

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

BSBSMB423 Create a digital technology plan for small business

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BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWOR302 Work effectively as an off-site worker

BSBWOR424 Develop a time management plan

BSBXCS301 Protect own personal online profile from cyber security threats

BSBXCS302 Identify and report online security threats

BSBXCS303 Securely manage personally identifiable information and workplace information

FNSFLT201 Develop and use a personal budget

Qualification Mapping Information

Supersedes and is equivalent to BSB30307 Certificate III in Micro Business Operations.

Links

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

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BSB30415 Certificate III in Business Administration

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

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- 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.

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

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

BSBITU314 Design and 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

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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

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

BSBITU311 Use simple relational databases

BSBITU315 Purchase goods and services online

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 Release 2	BSB30415 Certificate III in Business Administration Release 1	Updates to codes and titles in the unit list	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 4	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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.

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

BSBITU212 Create and use spreadsheets

BSBITU311 Use simple relational databases

BSBITU312 Create electronic presentations

BSBITU307 Develop keyboarding speed and accuracy

BSBITU309 Produce desktop published documents

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BSBMKG401 Profile the market

BSBRKG402 Provide information from and about records

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWRT301 Write simple documents

BSBWHS301 Maintain workplace safety

BSBWHS307 Apply knowledge of WHS laws in the workplace

CHCADV001 Facilitate the interests and rights of clients

ICTICT103 Use, communicate and search securely on the internet

Qualification Mapping Information

Supersedes and is equivalent to BSB30507 Certificate III in Business Administration (International Education).

Links

Companion Volume Implementation Guides are available from 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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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
- 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

BSBITU306 Design and produce business documents

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BSBITU313 Design and produce digital text documents

BSBITU315 Purchase goods and services online

BSBPRO301 Recommend products and services

BSBPUR301 Purchase goods and services

BSBSUS401 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 Release 3	BSB30615 Certificate III in International Trade Release 2	Updated codes and titles in unit list	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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BSB30719 Certificate III in Work Health and Safety

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 6.1. Unit added to the elective bank.
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Qualification Description

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

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 11

6 core units plus

5 elective units, of which:

- 3 units must be from the elective units listed below
- for the remaining 2 units:
  - up to 2 units may be selected from any currently endorsed Training Package qualification or accredited course at the same Australian Qualifications Framework (AQF) level
  - if not listed, 1 unit may be selected from a Certificate II or Certificate IV, from any currently endorsed Training Package qualification or accredited course.

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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

BSBWHS307 Apply knowledge of WHS laws in the workplace

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

BSBWHS309 Contribute effectively to WHS communication and consultation processes

BSBWHS310 Contribute to WHS issue-resolution processes

BSBWHS331 Participate in identifying and controlling hazardous chemicals

PUAFER001 Identify, prevent and report potential facility emergency situations

Elective units

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

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWHS332X Apply infection prevention and control procedures to own work activities

BSBWHS416 Contribute to workplace incident response

BSBWRT301 Write simple documents

CPPWMT3044A Identify wastes and hazards

HLTAID003 Provide first aid

HLTAID005 Provide first aid in remote situations

MEM13001B Perform emergency first aid

PUAFER004 Respond to facility emergencies

RIIVEH305E Operate and maintain a four wheel drive vehicle

RIIWHS202D Enter and work in confined spaces

RIIWHS204D Work safely at heights

Qualification Mapping Information

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

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Links

Companion Volume Implementation Guides are available from 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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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:

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- 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.

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

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBITU311 Use simple relational databases

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

BSBITU314 Design and produce spreadsheets

BSBITU315 Purchase goods and services online

BSBPRO301 Recommend products and services

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

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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**
BSB30815 Certificate III in Recordkeeping Release 3	BSB30815 Certificate III in Recordkeeping Release 2	Updated codes and titles in unit list	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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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- 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.

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

CHCCCS007 Develop and implement service programs

ICTICT103 Use, communicate and search securely on the internet

PSPETH001 Uphold the values and principles of public service

PSPGEN021 Contribute to conflict management

PSPLEG001 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

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

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BSBITU314 Design and produce spreadsheets

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

BSBITU311 Use simple relational databases

BSBITU315 Purchase goods and services online

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) Release 3	BSB30915 Certificate III in Business Administration (Education) Release 2	Updates to codes and titles in the unit list	Equivalent qualification

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Links

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BSB31015 Certificate III in Business Administration (Legal)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

BSBITU314 Design and produce spreadsheets

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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

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

BSBITU311 Use simple relational databases

BSBITU315 Purchase goods and services online

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) Release 2	BSB31015 Certificate III in Business Administration (Legal) Release 1	Updated codes and titles in unit list	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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BSB31115 Certificate III in Business Administration (Medical)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

BSBITU306 Design and produce business documents

BSBITU309 Produce desktop published documents

BSBITU312 Create electronic presentations

BSBITU313 Design and produce digital text documents

BSBITU314 Design and produce spreadsheets

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

BSBINM303 Handle receipt and despatch of information

BSBINN201 Contribute to workplace innovation

BSBITU311 Use simple relational databases

BSBITU315 Purchase goods and services online

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) Release 2	BSB31115 Certificate III in Business Administration (Medical) Release 1	Updated codes and titles in unit list	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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BSB31215 Certificate III in Library and Information Services

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the role of individuals who use a broad range of skills and knowledge in a wide variety of environments.

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 4 must be selected from Group A
- up to 2 may be from Group A and/or Group B
- up to 2 may be from any currently endorsed Training Package or accredited course at Certificate II, III or 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.

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Core Units

BSBCUS201 Deliver a service to customers

BSBLIB304 Develop and use information literacy skills

BSBWHS302 Apply knowledge of WHS legislation in the workplace

BSBWOR203 Work effectively with others

CUAIND202 Develop and apply knowledge of information and cultural services

ICTICT203 Operate application software packages

Elective Units

Group A

BSBCON401 Work effectively in a business continuity context

BSBEBU401 Review and maintain a website

BSBINM301 Organise workplace information

BSBITU309 Produce desktop published documents

BSBLIB301 Catalogue objects into collections

BSBLIB302 Develop and apply knowledge of archives

BSBLIB303 Provide multimedia support

BSBLIB305 Use established cataloguing tools

BSBLIB306 Process and maintain information resources

BSBMKG414 Undertake marketing activities

BSBRKG301 Control records

BSBRKG302 Undertake disposal

BSBRKG303 Retrieve information from records

BSBRKG304 Maintain business records

BSBRKG305 Review recordkeeping functions

BSBRKG401 Review the status of a record

BSBRKG402 Provide information from and about records

BSBRKG404 Monitor and maintain records in an online environment

BSBSUS401 Implement and monitor environmentally sustainable work practices

CUAIND301 Work effectively in the creative arts industry

CUADIG303 Produce and prepare photo images

CUACNM301 Move and store collection material

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CUAATS301 Develop and apply knowledge of Aboriginal or Torres Strait Islander cultural arts

ICPDMT321 Capture a digital image

ICPDMT322 Edit a digital image

ICPPRP322 Digitise images for reproduction

ICPPRP397 Transfer digital files

ICTWEB201 Use social media tools for collaboration and engagement

SIRXSLS001 Sell to the retail customer

SITTGDE001 Interpret aspects of local Australian Indigenous culture

SITXCOM002 Show social and cultural sensitivity

SITXCOM003 Provide a briefing or scripted commentary

Group B

BSBLIB201 Assist with circulation services

BSBLIB202 Process information resource orders

CUAEVP201 Assist with the staging of public activities and events

ICTICT204 Operate a digital media technology package

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB31215 Certificate III in Library and Information Services Release 2	BSB31215 Certificate III in Library and Information Services Release 1	Updates to codes and titles in the unit list	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 4	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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.

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

BSBFIA412 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

BSBITA411 Design and develop relational databases

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BSBITS411 Maintain and implement digital 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

BSBRKG402 Provide information from and about records

BSBREL401 Establish networks

BSBRES411 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

BSBXCM401 Apply communication strategies in the workplace

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

BSBXTW401 Lead and facilitate a team

Qualification Mapping Information

Supersedes and is equivalent to BSB40212 Certificate IV in Business

Links

Companion Volume Implementation Guide is found on 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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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
- If not listed, up to 2 units may be from a Certificate III level 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

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

BSBMKG419 Analyse consumer behaviour

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

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BSBINM401 Implement workplace information system

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

BSBRES411 Analyse and present research information

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS401 Implement and monitor environmentally sustainable work practices

CHCINM001 Meet statutory and organisation information requirements

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 Release 3	BSB40315 Certificate IV in Customer Engagement Release 2	Updated codes and titles in unit list	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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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 from any currently endorsed Training Package or accredited course
- 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

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

BSBITA411 Design and develop relational 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

BSBFIA412 Report on financial activity

BSBINN301 Promote innovation in a team environment

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BSBITS411 Maintain and implement digital technology

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBMED401 Manage patient record keeping system

BSBREL401 Establish networks

BSBRES411 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS401 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 Release 3	BSB40515 Certificate IV in Business Administration Release 2	Updated codes and titles in unit list	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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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- 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.

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

BSBFIA412 Report on financial activity

BSBADM405 Organise meetings

BSBADM406 Organise business travel

BSBADM409 Coordinate business resources

BSBINT401 Research international business opportunities

BSBCMM401 Make a presentation

BSBITU311 Use simple relational databases

BSBITU402 Develop and use complex spreadsheets

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBMKG401 Profile the market

BSBMKG408 Conduct market research

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBMKG415 Research international markets

BSBMKG416 Market goods and services internationally

BSBMKG417 Apply marketing communication across a convergent industry

BSBMKG418 Develop and apply knowledge of marketing communication industry

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BSBMKG419 Analyse consumer behaviour

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

BSBREL401 Establish networks

BSBREL403 Implement international client relationship strategies

BSBRES411 Analyse and present research information

BSBSLS501 Develop a sales plan

BSBSLS502 Lead and manage a sales team

BSBSUS401 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 Release 3	BSB40615 Certificate IV in Business Sales Release 2	Updated codes and titles in unit list	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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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:

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

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- 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 either a Certificate III or Diploma qualification 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

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

BSBFIA412 Report on financial activity

BSBFRA301 Work within a franchise

BSBFRA404 Manage a multiple site franchise

BSBIPR405 Protect and use intangible assets in small business

BSBITS411 Maintain and implement digital 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

BSBRES411 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS401 Implement and monitor environmentally sustainable work practices

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

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BSBWRT401 Write complex documents

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40715 Certificate IV in Franchising Release 3	BSB40715 Certificate IV in Franchising Release 2	Updated codes and titles in unit list	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 2	This qualification first released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Qualification Description

This qualification supports board of governance roles. Individuals undertaking this qualification will typically be a board member, a coordinator of quality governance or a committee member.

Those undertaking this qualification provide leadership and guidance to others with some limited responsibility for the output of others.

This qualification reflects the role of operators who apply a broad range of knowledge of business or core functions of organisations and contribute their skills and knowledge to monitoring and guiding the activities of the organisation at a board level. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources.

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

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3 core units plus

7 elective units, of which:

- 4 of the elective units must be selected from the elective units listed below
- the remaining 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 any currently endorsed Training Package or accredited course at 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

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

BSBGOV404 Communicate with community stakeholders

BSBGOV405 Undertake the roles and responsibilities of a committee or a board member

BSBGOV501 Review and apply the organisation's constitution

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

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

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Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB40915 Certificate IV in Governance (Release 2)	BSB40915 Certificate IV in Governance (Release 1)	Updated unit list	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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BSB41015 Certificate IV in Human Resources

Modification History

Release	Comments
Release 4	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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Packaging Rules

Total number of units = 10

6 core units plus

4 elective units, of which:

- 2 units must be from the elective units listed below
- 2 units may be from any endorsed Training Package or accredited course at Certificate III 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.

Core Units

BSBHRM403 Support performance-management processes

BSBHRM404 Review human resources functions

BSBHRM405 Support the recruitment, selection and induction of staff

BSBLDR402 Lead effective workplace relationships

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

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

BSBFIA412 Report on financial activity

BSBINM401 Implement workplace information system

BSBINN301 Promote innovation in a team environment

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BSBITU314 Design and 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

BSBREL401 Establish networks

BSBRES411 Analyse and present research information

BSBRKG404 Monitor and maintain records in an online environment

BSBRSK401 Identify risk and apply risk management processes

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWRK412 Contribute to personal development

BSBWRT401 Write complex documents

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

TAEDEL301 Provide work skill instruction

Qualification Mapping Information

Supersedes and is equivalent to BSB41013 Certificate IV in Human Resources

Links

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

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BSB41115 Certificate IV in International Trade

Modification History

Release	Comments
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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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
- 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 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.

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

BSBFIA412 Report on financial activity

BSBINM401 Implement workplace information system

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BSBITS411 Maintain and implement digital technology

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

BSBRES411 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

BSBSUS401 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 Release 3	BSB41115 Certificate IV in International Trade Release 2	Updated codes and titles in unit list	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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BSB41419 Certificate IV in Work Health and Safety

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Qualification Description

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

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

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

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

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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

BSBWHS412 Assist with workplace compliance with WHS laws

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

BSBWHS414 Contribute to WHS risk management

BSBWHS415 Contribute to implementing WHS management systems

BSBWHS416 Contribute to workplace incident response

Elective units

Group A

BSBRES411 Analyse and present research information

BSBWHS417 Assist with managing WHS implications of return to work

BSBWHS418 Assist with managing WHS compliance of contractors

BSBWHS419 Contribute to implementing WHS monitoring processes

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

BSBWRT401 Write complex documents

Group B

BSBCMM401 Make a presentation

BSBINN301 Promote innovation in a team environment

BSBMGT401 Show leadership in the workplace

BSBMGT403 Implement continuous improvement

BSBPMG409 Apply project scope management techniques

BSBSUS401 Implement and monitor environmentally sustainable work practices

PUACOM008 Develop and organise public safety awareness programs

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

RIIWHS403D Apply the mine work health and safety management plan

TAEASS301 Contribute to assessment

TAEDEL301 Provide work skill instruction

Qualification Mapping Information

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

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Links

Companion Volume Implementation Guides are available from 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 5	This qualification first released with BSB Business Services Training Package Version 6.0. Version created to update unit list.
Release 4	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 3	This version first released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 2	This version first released with BSB Business Services Training Package Version 1.2. Version created to update incomplete unit list.
Release 1	This version 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.

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Entry Requirements

Nil

Packaging Rules

Total number of units = 9

3 core units plus

6 elective units, of which:

- 3 units must be from Group A elective units below
- the remaining 3 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

BSBPMG418 Apply project stakeholder engagement techniques

Group B

BSBADM405 Organise meetings

BSBCUE405 Survey stakeholders to gather and record information

BSBLEG415 Apply the principles of contract law

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BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements
BSBXBD401 Capture and store big data
BSBXBD402 Test big data samples
BSBXBD403 Analyse big data
BSBXBD404 Use big data for operational decision making
BSBXBD405 Develop procedures for managing big data
BSBXBD406 Present big data insights
BSBXBD407 Protect big data integrity
BSBXBD408 Implement and review procedures for managing big data
BSBXCS401 Maintain security of digital devices
BSBXCS402 Promote workplace cyber security awareness and practices
BSBXCS403 Contribute to cyber security threat assessments
BSBXCS404 Contribute to cyber security risk management
BSBXCS405 Contribute to cyber security incident responses
CPPDSM4047 Implement and monitor procurement process
MSMENV472 Implement and monitor environmentally sustainable work practices
PSPETH002 Uphold and support the values and principles of public service
PSPGEN043 Apply government processes
PSPPCY004 Support policy implementation
TLIE4006 Collect, analyse and present workplace data and information

Qualification Mapping Information

Supersedes and is equivalent to BSB41513 Certificate IV in Project Management 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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BSB41618 Certificate IV in Business (Procurement)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

Qualification Description

This qualification is suited to those working as purchasers, contract administrators and procurement 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 to analyse information from a variety of sources to drive organisational outcomes. They may provide guidance to others with some limited responsibility for the output of others.

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 = 12

5 core unit plus

7 elective units, of which:

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

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- 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 any Certificate IV 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

BSBPRC401 Plan procurement

BSBPRC402 Negotiate contracts

PSPPCM018 Conduct demand and procurement spend analysis

BSBCRT404 Apply advanced critical thinking to work processes

BSBPMG416 Apply project procurement procedures

Elective Units

BSBFIA412 Report on financial activity

BSBPRC406 Conduct e-procurement

BSBITU401 Design and develop complex text documents

BSBLDR402 Lead effective workplace relationships

BSBLDR403 Lead team effectiveness

BSBPRC403 Conduct international procurement

BSBRES411 Analyse and present research information

BSBMKG408 Conduct market research

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

BSBWRT401 Write complex documents

BSBXBD401 Capture and store big data

BSBXBD402 Test big data samples

BSBXBD403 Analyse big data

BSBXBD404 Use big data for operational decision making

BSBXBD405 Develop procedures for managing big data

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BSBXBD406 Present big data insights

BSBXBD407 Protect big data integrity

BSBXBD408 Implement and review procedures for managing big data

PSPPCM006 Select providers and develop contracts

PSPGEN039 Develop internal and external networks

PSPPCM011 Plan to manage a contract

PSPPCM007 Manage contracts

Qualification Mapping Information

Supersedes and is not equivalent to BSB41615 Certificate IV in Purchasing.

Links

Companion 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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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:

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- 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 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

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

BSBFIA412 Report on financial activity

BSBINN301 Promote innovation in a team environment

BSBITS411 Maintain and implement digital technology

BSBITU401 Design and develop complex text documents

BSBLDR403 Lead team effectiveness

BSBLED401 Develop teams and individuals

BSBMED401 Manage patient record keeping system

BSBMKG413 Promote products and services

BSBMKG414 Undertake marketing activities

BSBPMG522 Undertake project work

BSBREL401 Establish networks

BSBRES411 Analyse and present research information

BSBRSK401 Identify risk and apply risk management processes

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BSBSUS401 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**
BSB41715 Certificate IV in Recordkeeping Release 3	BSB41715 Certificate IV in Recordkeeping Release 2	Updated codes and titles in unit list	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 4	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 3	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 2	This version released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information.
Release 1	This version 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

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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 or from any currently endorsed Training Package or accredited course at this qualification level, 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

BSBRES411 Analyse and present research information

BSBSUS401 Implement and monitor environmentally sustainable work practices

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Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB41915 Certificate IV in Business (Governance) Release 4	BSB41915 Certificate IV in Business (Governance) Release 3	Updates to codes and titles in the unit list	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 5	This qualification first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 4	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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.

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Entry Requirements

Nil

Packaging Rules

Total number of units = 12

4 core units plus

8 elective units, of which:

- 4 units must be selected from Group A
- 4 units may be additional units selected from Group A or Group B
- if not listed below, 1 unit may be from any currently 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.

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

BSBFIA412 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

TAEDEL404 Mentor in the workplace

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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

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

BSBRES411 Analyse and present research information

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWRT401 Write complex documents

BSBXBD401 Capture and store big data

BSBXBD402 Test big data samples

BSBXBD403 Analyse big data

BSBXBD404 Use big data for operational decision making

BSBXBD405 Develop procedures for managing big data

BSBXBD406 Present big data insights

BSBXBD407 Protect big data integrity

BSBXBD408 Implement and review procedures for managing big data

BSBXCM401 Apply communication strategies in the workplace

BSBXCS401 Maintain security of digital devices

BSBXCS402 Promote workplace cyber security awareness and practices

BSBXCS403 Contribute to cyber security threat assessments

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BSBXCS404 Contribute to cyber security risk management

BSBXCS405 Contribute to cyber security incident responses

BSBXTW401 Lead and facilitate a team

Qualification Mapping Information

No equivalent qualification. Supersedes and is not equivalent to BSB40812 Certificate IV in Frontline Management.

Links

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

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BSB42115 Certificate IV in Library and Information Services

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the role of individuals who use well developed skills and a broad knowledge base in a wide variety of contexts. They 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.

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 = 15

6 core units plus

9 elective units, of which:

- 5 elective units must be selected from Group A
- 2 elective units must be selected from Group A and/or Group B
- 2 elective units may be selected from Group A, B and/or Group C or from any currently endorsed Training Package or accredited course at Certificate III, IV 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

BSBCUS301 Deliver and monitor a service to customers

BSBIPR401 Use and respect copyright

BSBLDR403 Lead team effectiveness

BSBLIB303 Provide multimedia support

BSBLIB402 Consolidate and maintain industry knowledge

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

Elective Units

Group A

BSBLIB201 Assist with circulation services

BSBLIB401 Record and maintain collection information

BSBLIB403 Complete a range of cataloguing activities

BSBLIB404 Use integrated library management systems

BSBLIB405 Assist customers to access information

BSBLIB406 Obtain information from external and networked sources

BSBLIB407 Search library and information databases

CUACNM401 Assess the significance of collection objects

CUACNM403 Work with cultural material

CUAEVP401 Present information on activities, events and public programs

CUAEVP402 Design and develop interpretive displays

CUAPRE401 Implement preventive conservation activities

Group B

BSBCON401 Work effectively in a business continuity context

BSBEBU401 Review and maintain a website

BSBRKG502 Manage and monitor business or records systems

CPCCWHS1001 Prepare to work safely in the construction industry

CUACNM402 Prepare display mounts for collection material

CUAEVP403 Install and dismantle exhibition elements

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ICPPRP422 Digitise complex images for reproduction

ICPPRN386 Troubleshoot digital media

ICTWEB201 Use social media tools for collaboration and engagement

ICTWEB420 Write content for web pages

SITTGDE005 Prepare and present tour commentaries or activities

SITTGDE006 Develop and maintain the general and regional knowledge required by guides

SITTGDE010 Prepare specialised interpretive content on cultural and heritage environments

SITXMPR001 Coordinate production of brochures and marketing materials

Group C

BSBLIB301 Catalogue objects into collections

BSBLIB302 Develop and apply knowledge of archives

BSBLIB305 Use established cataloguing tools

BSBLIB306 Process and maintain information resources

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWOR301 Organise personal work priorities and development

BSBWRT301 Write simple documents

ICTICT104 Use digital devices

ICTICT203 Operate application software packages

SISXFAC003 Implement facility maintenance programs

TAEDEL301 Provide work skill instruction

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB42115 Certificate IV in Library and Information Services Release 2	BSB42115 Certificate IV in Library and Information Services Release 1	Updates to codes and titles in the unit list	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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BSB42215 Certificate IV in Legal Services

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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 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

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

BSBSUS401 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 Release 2	BSB42215 Certificate IV in Legal Services Release 1	Updated unit list	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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BSB42315 Certificate IV in Environmental Management and Sustainability

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the role of individuals who are engaged in environmental management and sutainability in a range of workplace contexts.

It covers the skills and knowledge required to monitor and address environmental issues in a variety of industry sectors.

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:

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- 2 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 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

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBSUS402 Implement an environmental management plan

BSBSUS403 Measure, monitor and reduce carbon emissions

BSBSUS404 Assess, implement, monitor and report on waste management

Elective Units

BSBRSK401 Identify risk and apply risk management processes

BSBSMB410 Review and implement energy efficiency in business operations

BSBSUS405 Assess, monitor and reduce water use

BSBSUS406 Identify and apply sustainability rating tools

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS412 Assist with workplace compliance with WHS laws

TAEDEL404 Mentor in the workplace

AHCSAW302 Implement erosion and sediment control measures

Qualification Mapping Information

No equivalent qualification.

Links

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

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BSB42415 Certificate IV in Marketing and Communication

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification is suitable for those who use well developed marketing and communication skills and a broad knowledge base in a wide variety of 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 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 = 12

5 core units plus

7 elective units, of which:

- 6 elective units must be selected from the electives listed below

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- the remaining elective unit may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at Certificate IV 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

BSBCMM401 Make a presentation

BSBCRT401 Articulate, present and debate ideas

BSBMGT407 Apply digital solutions to work processes

BSBMKG417 Apply marketing communication across a convergent industry

BSBMKG418 Develop and apply knowledge of marketing communication industry

Elective Units

BSBADV402 Conduct pre-campaign testing

BSBADV403 Monitor advertising production

BSBADV404 Schedule advertisements

BSBADV405 Perform media calculations

BSBADV406 Buy and monitor media

BSBADV407 Apply media analysis and processing tools

BSBADV408 Review advertising media options

BSBCUS401 Coordinate implementation of customer service strategies

BSBFIA412 Report on financial activity

BSBINM401 Implement workplace information system

BSBIPR403 Protect and use brands and business identity

BSBLDR402 Lead effective workplace relationships

BSBMKG401 Profile the market

BSBMKG408 Conduct market research

BSBMKG409 Design direct response offers

BSBMKG410 Test direct marketing activities

BSBMKG411 Analyse direct marketing databases

BSBMKG413 Promote products and services

BSBMKG419 Analyse consumer behaviour

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BSBMKG420 Create digital media user experiences

BSBMKG421 Optimise digital media impact

BSBPRO401 Develop product knowledge

BSBPUB402 Develop public relations campaigns

BSBPUB403 Develop public relations documents

BSBRES411 Analyse and present research information

BSBWRT401 Write complex documents

CUAWRT401 Edit texts

CUAWRT402 Write extended stories

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB42415 Certificate IV in Marketing and Communication Release 2	BSB42415 Certificate IV in Marketing and Communication Release 1	Updates to codes and titles in unit list	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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BSB42518 Certificate IV in Small Business Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

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 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:

- 4 elective units must be selected from the elective units listed below
- the remaining 2 elective units may be selected from any currently endorsed Training Package or accredited course at Certificate IV level
- if not listed below, 1 elective unit may be selected from 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 Unit

BSBSMB404 Undertake small business planning

BSBSMB415 Refine and strengthen a small business

BSBSMB421 Manage small business finances

BSBSMB423 Create a digital technology plan for small business

Elective Units

BSBCRT501 Originate and develop concepts

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBEBU401 Review and maintain a website

BSBFIA412 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

BSBITU422 Use digital technologies to collaborate in the workplace

BSBLDR401 Communicate effectively as a workplace leader

BSBLDR402 Lead effective workplace relationships

BSBLDR404 Lead a diverse workforce

BSBLED401 Develop teams and individuals

BSBMGT404 Lead and facilitate off-site staff

BSBMKG413 Promote products and services

BSBPMG522 Undertake project work

BSBREL401 Establish networks

BSBREL402 Build client relationships and business networks

BSBRES411 Analyse and present research information

BSBSMB401 Establish and comply with legal and risk requirements of small business

BSBSMB402 Plan small business finances

BSBSMB403 Market the small business

BSBSMB407 Manage a small team

BSBSMB408 Manage personal, family, cultural and business obligations

BSBSMB409 Build and maintain relationships with small business stakeholders

BSBSMB410 Review and implement energy efficiency in business operations

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BSBSMB411 Manage specialist external advisory services

BSBSMB417 Recruit staff

BSBSMB418 Manage compliance for small business

BSBSMB420 Evaluate and develop small business operations

BSBSMB422 Plan small business growth

BSBSUS401 Implement and monitor environmentally sustainable work practices

BSBWOR424 Develop a time management plan

FNSACC416 Set up and operate a computerised accounting system

PSPGEN028 Provide a quotation

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB42518 Certificate IV in Small Business Management	BSB42515 Certificate IV in Small Business Management	Updates to core and elective units	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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BSB42618 Certificate IV in New Small Business

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify error in unit grid
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Qualification Description

This qualification is suitable for those establishing a small business who use well developed skills and a broad knowledge base to solve a range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others, and have responsibility for the output of others.

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units, of which:

- all 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 Certificate III or Diploma qualification 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 Unit

BSBSMB401 Establish legal and risk management requirements of small business

BSBSMB403 Market the small business

BSBSMB404 Undertake small business planning

BSBSMB421 Manage small business finances

Elective Units

BSBADM409 Coordinate business resources

BSBCUS401 Coordinate implementation of customer service strategies

BSBCUS402 Address customer needs

BSBEBU401 Review and maintain a website

BSBFIA412 Report on financial activity

BSBINN301 Promote innovation in a team environment

BSBINT303 Organise the importing and exporting of goods

BSBIPR405 Protect and use intangible assets in small business

BSBITU422 Use digital technologies to collaborate in the workplace

BSBMGT404 Lead and facilitate off-site staff

BSBREL401 Establish networks

BSBREL402 Build client relationships and business networks

BSBRES411 Analyse and present research information

BSBSMB201 Identify suitability for micro business

BSBSMB301 Investigate micro business opportunities

BSBSMB407 Manage a small team

BSBSMB408 Manage personal, family, cultural and business obligations

BSBSMB409 Build and maintain relationships with small business stakeholders

BSBSMB410 Review and implement energy efficiency in business operations

BSBSMB411 Manage specialist external advisory services

BSBSMB420 Evaluate and develop small business operations

BSBSMB423 Create a digital technology plan for small business

BSBSUS401 Implement and monitor environmentally sustainable work practices

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BSBWOR424 Develop a time management plan

PSPGEN028 Provide a quotation

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB42618 Certificate IV in New Small Business	BSB42615 Certificate IV in New Small Business	Updates to core and elective units	Equivalent qualification

Links

Companion Volume Implementation Guides are available from 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 4	This qualification first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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.

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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
- 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

BSBEBU511 Develop and implement an e-business strategy

BSBFIM502 Manage payroll

BSBITB511 Establish and maintain a network of digital devices

BSBXCM501 Lead communication in the workplace

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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
BSBLED502 Manage programs that promote personal effectiveness
BSBXDB501 Support staff members with disability in the workplace
BSBXDB502 Adapt organisations to enhance accessibility for people with disability

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

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BSBXBD501 Develop big data strategy

Qualification Mapping Information

Supersedes and is equivalent to BSB50207 Diploma of Business

Links

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BSB50315 Diploma of Customer Engagement

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

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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.

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

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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

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

BSBITA611 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

BSBWHS521 Ensure a safe workplace for a work area

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

Supersedes and is equivalent to BSB50311 Diploma of Customer Contact.

Links

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

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BSB50415 Diploma of Business Administration

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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.

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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

BSBADM502 Manage meetings

BSBADM503 Plan and manage conferences

BSBADM504 Plan and implement administrative systems

BSBADM506 Manage business document design and development

BSBFIM502 Manage payroll

BSBITB511 Establish and maintain a network of digital devices

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 Release 2	BSB50415 Diploma of Business Administration Release 1	Updates to codes and titles in the unit list	Equivalent qualification

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Links

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BSB50515 Diploma of Franchising

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 1	This version 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.

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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

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

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Supersedes and is equivalent to BSB50507 Diploma of Franchising.

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Links

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

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BSB50618 Diploma of Human Resources Management

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

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

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- 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.

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

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

BSBWRK520 Manage employee relations

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

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BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

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

BSBWHS521 Ensure a safe workplace for a work area

BSBXDB501 Support staff members with disability in the workplace

BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Qualification Mapping Information

Supersedes and is equivalent to BSB50615 Diploma of Human Resources Management.

Links

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

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BSB50715 Diploma of Business (Governance)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

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- 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.

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

PSPGEN049 Undertake negotiations

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSB50715 Diploma of Business (Governance)	BSB50715 Diploma of Business (Governance)	Updates to codes and titles in the unit list	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
Release 2	Release 1		

Links

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BSB50815 Diploma of International Business

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 1	This version 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

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- 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.

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

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BSBPMG516 Manage project information and communications

BSBPMG517 Manage project risk

BSBPMG518 Manage project procurement

BSBPMG522 Undertake project work

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

Qualification Mapping Information

Supersedes and is equivalent to BSB50807 Diploma of International Business.

Links

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

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BSB51319 Diploma of Work Health and Safety

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 6.0. Version created to resolve error in unit grid.
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Qualification Description

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

Licensing/Regulatory Information

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

Entry Requirements

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

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

Packaging Rules

Total number of units = 10

5 core units plus

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5 elective units, of which:

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

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

Core units

BSBWHS513 Lead WHS risk management

BSBWHS515 Lead initial response to and investigate WHS incidents

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

BSBWHS519 Lead the development and use of WHS risk management tools

BSBWHS522 Manage WHS consultation and participation processes

Elective units

Group A

BSBWHS512 Contribute to managing work-related psychological health and safety

BSBWHS514 Manage WHS compliance of contractors

BSBWHS517 Contribute to managing a WHS information system

BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

BSBWHS520 Manage implementation of emergency procedures

BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Group B

BSBHRM509 Manage rehabilitation or return to work programs

BSBINN601 Lead and manage organisational change

BSBITU501 Conduct data analysis

BSBLDR511 Develop and use emotional intelligence

BSBLDR513 Communicate with influence

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

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BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR502 Lead and manage team effectiveness

TAEDEL401 Plan, organise and deliver group-based learning

Qualification Mapping Information

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

Links

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

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BSB51415 Diploma of Project Management

Modification History

Release	Comments
Release 4	This version first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

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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

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
BSBXBD501 Develop big data strategy
BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system
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
MSS015002 Develop strategies for more sustainable use of resources
PSPETH003 Promote the values and ethos of public service

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Qualification Mapping Information

Supersedes and is equivalent to BSB51413 Diploma of Project Management.

Links

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BSB51518 Diploma of Business (Procurement)

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

Qualification Description

This qualification would apply to individuals who contribute their skills and knowledge to leading, monitoring and guiding the activities of procurement teams. They may demonstrate a range of managerial skills to ensure that procurement activities are conducted effectively, whilst maintaining relationships with both internal and external stakeholders.

They will have responsibility to drive business strategies and add value through complex procurement initiatives.

Licensing/Regulatory Information

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

Entry Requirements

Nil

Packaging Rules

Total number of units = 11

5 core units plus

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6 elective units, of which:

- 5 elective units must be selected from the elective units listed below
- the remaining 1 unit 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 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

BSBCRT502 Develop critical thinking skills in others

BSBPRC501 Manage procurement strategies

BSBPRC502 Manage supplier relationships

BSBPRC504 Manage a supply chain

BSBPRC505 Manage ethical procurement strategy

Elective Units

BSBITU501 Conduct data analysis

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

BSBMGT519 Incorporate digital solutions into plans and practices

BSBPMG518 Manage project procurement

BSBPRC503 Manage international procurement

BSBWHS521 Ensure a safe workplace for a work area

BSBXBD501 Develop big data strategy

PSPPCM008 Manage contract performance

PSPPCM009 Finalise contracts

PSPPCM010 Manage procurement risk

PSPPCM012 Plan for procurement outcomes

PSPPCM013 Make procurement decisions

PSPPCM015 Conduct and manage coordinated procurement

PSPPCM016 Plan and implement strategic sourcing

PSPPCM017 Plan and implement procurement category management

PSPPCM018 Conduct demand and procurement spend analysis

Qualification Mapping Information

No equivalent qualification. Supersedes and is not equivalent to BSB51515 Diploma of Purchasing.

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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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BSB51918 Diploma of Leadership and Management

Modification History

Release	Comments
Release 4	This version first released with BSB Business Services Training Package Version 6.0. Version created to update Elective Unit list.
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 4.0. Version created to update Elective Unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

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.

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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
- 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

BSBLDR502 Lead and manage effective workplace relationships

BSBLDR511 Develop and use emotional intelligence

BSBMGT517 Manage operational plan

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 of staff

BSBINN502 Build and sustain an innovative work environment

BSBIPR501 Manage intellectual property to protect and grow business

BSBLDR504 Implement diversity in the workplace

BSBLDR513 Communicate with influence

BSBMGT502 Manage people performance

BSBMGT516 Facilitate continuous improvement

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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

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR501 Manage personal work priorities and professional development

Group B

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

BSBWRK520 Manage employee relations

BSBXBD501 Develop big data strategy

BSBXCM501 Lead communication in the workplace

Qualification Mapping Information

Supersedes and is equivalent to BSB51915 Diploma of Leadership and Management

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BSB52015 Diploma of Conveyancing

Modification History

Release	Comments
Release 4	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
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

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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.

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

FNSACC413 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

BSBITS411 Maintain and implement digital technology

BSBLDR402 Lead effective workplace relationships

BSBLEG416 Apply the principles of the law of torts

BSBLEG417 Apply the principles of evidence law

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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

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

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

TAEDEL402 Plan, organise and facilitate learning in the workplace

Qualification Mapping Information

Supersedes and is equivalent to FNS50411 Diploma of Conveyancing.

Links

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

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BSB52115 Diploma of Library and Information Services

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the role of individuals with a sound theoretical knowledge base who use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work or the work of a team. They may provide leadership and guidance to others and have some 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 = 19

7 core units plus

12 elective units, of which:

- 9 elective units must be selected from Group A and/or Group B

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- up to 3 may be selected from Group A, B and/or Group C, 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.

Note: To meet accreditation requirements as a Library Technician, at least 7 elective units must be from Group A.

Core Units

BSBCUS501 Manage quality customer service

BSBLDR403 Lead team effectiveness

BSBLIB402 Consolidate and maintain industry knowledge

BSBLIB503 Develop and promote activities, events and public programs

BSBLIB513 Monitor compliance with copyright and licence requirements

BSBLIB604 Extend own information literacy

ICTSAS410 Identify and resolve client IT problems

Elective Units

Group A

BSBEBU401 Review and maintain a website

BSBLIB403 Complete a range of cataloguing activities

BSBLIB406 Obtain information from external and networked sources

BSBLIB407 Search library and information databases

BSBLIB506 Maintain digital repositories

BSBLIB507 Promote literature and reading

BSBLIB508 Analyse and describe information resources

BSBLIB509 Provide subject access and classify material

BSBLIB510 Use and monitor advanced functions of integrated library management systems

BSBLIB511 Research and analyse information to meet customer needs

BSBLIB512 Develop and maintain community and stakeholder relationships

BSBLIB603 Contribute to collection management

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Group B

BSBCON601 Develop and maintain business continuity plans

BSBLIB501 Manage lending and borrowing processes for collections

BSBLIB502 Manage the development of collections

BSBLIB504 Develop exhibition concepts

BSBLIB505 Develop disaster management plans

BSBLIB601 Research and document collection material

BSBLIB602 Develop and monitor procedures for the movement and storage of collection material

BSBLIB605 Analyse and describe specialist and complex material

BSBPMG522 Undertake project work

BSBRKG502 Manage and monitor business or records systems

BSBRKG601 Define recordkeeping framework

BSBRKG608 Plan management of records over time

BSBRSK501 Manage risk

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR501 Manage personal work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

CHCVOL003 Recruit, induct and support volunteers

CUAATS504 Work with Aboriginal and Torres Strait Islander cultural material

CUACNM501 Assess the significance of collections

CUAEVP501 Coordinate the installation and dismantling of exhibitions

CUAEVP502 Develop and implement exhibition interpretive strategies

CUACNM601 Manage collection maintenance and preservation procedures

FNSORG501 Develop and manage a budget

ICTWEB417 Integrate social web technologies

ICTWEB418 Use development software and IT tools to build a basic website

ICTWEB420 Write content for web pages

SITTGDE005 Prepare and present tour commentaries or activities

SITTGDE010 Prepare specialised interpretive content on cultural and heritage environments

Group C

BSBLIB303 Provide multimedia support

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BSBLIB305 Use established cataloguing tools

BSBMKG413 Promote products and services

BSBWRT401 Write complex documents

CHCDIV001 Work with diverse people

CHCLLN001 Respond to client language, literacy and numeracy needs

CUAEVP403 Install and dismantle exhibition elements

CUAFIM401 Obtain revenue to support operations

FNSPIM412 Participate in formal communication processes

ICTICT308 Use advanced features of computer applications

ICTWEB201 Use social media tools for collaboration and engagement

SITXHRM002 Roster staff

TAEDES401 Design and develop learning programs

Qualification Mapping Information

No equivalent qualification. Supersedes and is not equivalent to CUL50111 Diploma of Library and Information Services.

Links

Companion Volume Implementation Guides are available from 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
Release 1	This version 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

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- if not listed below, 1 elective unit may be selected from either a Certificate IV or Advanced Diploma qualification 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

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

BSBSUS401 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 Release 2	BSB52215 Diploma of Legal Services Release 1	Updated unit list	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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BSB52318 Diploma of Governance

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Qualification Description

This qualification applies to board of governance roles. Individuals undertaking this qualification will typically be a board chairperson or a board member with special responsibility, a coordinator of quality governance or a committee member.

Those undertaking this qualification provide leadership and guidance to others with some responsibility for the output of others.

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 requirements.

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 individuals who:

- have completed a Certificate IV in Governance

or

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- provide evidence of competency in the core units required for BSB40915 Certificate IV in Governance

or

- have vocational experience in a range of environments working with boards of governance, but with no formal qualification.
-

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 4 units must be selected from the elective units listed below
- the remaining 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 IV or Advanced Diploma from any currently endorsed Training Package or accredited course.

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

Core Units

BSBGOV404 Communicate with community stakeholders

BSBGOV405 Undertake the roles and responsibilities of a committee or a board member

BSBGOV501 Review and apply the organisation's constitution

BSBGOV503 Conduct organisational strategic planning

BSBGOV504 Monitor organisational finances

BSBLDR513 Communicate with influence

Elective Units

BSBADM502 Manage meetings

BSBCOM503 Develop processes for the management of breaches in compliance requirements

BSBDIV501 Manage diversity in the workplace

BSBFIM501 Manage budgets and financial plans

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BSBGOV502 Recruit and coordinate committee members

BSBGOV505 Seek and apply for funding opportunities

BSBGOV506 Manage advocacy for your organisation

BSBGOV507 Manage board or committee and organisational conflict

BSBHRM506 Manage recruitment selection and induction processes

BSBHRM512 Develop and manage performance-management processes

BSBINN501 Establish systems that support innovation

BSBIPR501 Manage intellectual property to protect and grow business

BSBLDR502 Lead and manage effective workplace relationships

BSBLDR511 Develop and use emotional intelligence

BSBMGT516 Facilitate continuous improvement

BSBMGT517 Manage operational plan

BSBPUB503 Manage fundraising or sponsorship activities

BSBRSK501 Manage risk

BSBSMB401 Establish legal and risk management requirements of small business

BSBSUS501 Develop workplace policy and procedures for sustainability

BSBWHS521 Ensure a safe workplace for a work area

BSBWOR501 Manage personal and work priorities and professional development

BSBWOR502 Lead and manage team effectiveness

BSBWRT401 Write complex documents

CHCPRP001 Develop and maintain networks and collaborative partnerships

FNSCMP501 Comply with financial services legislation

PSPGEN049 Undertake negotiations

Qualification Mapping Information

Supersedes and is equivalent to BSB52315 Diploma of Governance.

Links

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

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BSB52415 Diploma of Marketing and Communication

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

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

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 individuals who:

- have completed a*ll core units in BSB42415 Certificate IV in Marketing and Communication.*

Packaging Rules

Total number of units = 12

3 core units plus

9 elective units, of which:

- 8 elective units must be selected from the electives listed below
- the remaining elective unit may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at 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

BSBMKG507 Interpret market trends and developments

BSBMKG523 Design and develop an integrated marketing communication plan

BSBPMG522 Undertake project work

Elective Units

BSBADV503 Coordinate advertising research

BSBADV507 Develop a media plan

BSBADV509 Create mass print media advertisements

BSBADV510 Create mass electronic media advertisements

BSBCRT501 Originate and develop concepts

BSBDES602 Research global design trends

BSBEBU511 Develop and implement an e-business strategy

BSBFIM501 Manage budgets and financial plans

BSBIPR501 Manage intellectual property to protect and grow business

BSBLDR502 Lead and manage effective workplace relationships

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

BSBMKG506 Plan market research

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

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

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BSBMKG528 Mine data to identify industry directions

BSBMKG529 Manage client account

BSBMKG530 Create distributed multiplatform digital advertisements

BSBMKG534 Design effective digital user experiences

BSBMKG535 Devise a seach engine optimisation strategy

BSBMKG536 Develop strategies to monitise digital engagement

BSBMKG537 Develop a social media engagement 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

BSBWRT501 Write persuasive copy

ICTGAM504 Manage interactive media production

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB52415 Diploma of Marketing and Communication Release 2	BSB52415 Diploma of Marketing and Communication Release 1	Updates to codes and titles in the unit list	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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BSB60619 Advanced Diploma of Work Health and Safety

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Qualification Description

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

Licensing/Regulatory Information

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

Entry Requirements

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

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

Packaging Rules

Total number of units = 11

5 core units plus

6 elective units, of which:

- at least 3 elective units must be from Group A
- for the remaining 3 units:

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- up to 3 units may be selected from Group B
- if not listed, 1 unit may be selected from a Diploma or Advanced Diploma from any currently endorsed Training Package or accredited course.

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

Core units

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

BSBWHS613 Evaluate the WHS performance of an organisation

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

BSBWHS616 Apply safe design principles to control WHS risks

BSBWHS617 Apply ergonomics to manage WHS risks

Elective units

Group A

BSBCOM601 Research compliance requirements and issues

BSBCOM603 Plan and establish compliance management systems

BSBMGT605 Provide leadership across the organisation

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

BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Group B

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBLDR511 Develop and use emotional intelligence

BSBMGT608 Manage innovation and continuous improvement

BSBMGT616 Develop and implement strategic plans

BSBPMG602 Direct the scope of a project program

BSBPMG621 Facilitate stakeholder engagement

TAEDES501 Design and develop learning strategies

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Qualification Mapping Information

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

Links

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

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BSB60815 Advanced Diploma of Recordkeeping

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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.

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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

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

PSPGEN067 Establish and maintain strategic networks

PSPPPCM023 Manage strategic contracts

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Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB60815 Advanced Diploma of Recordkeeping Release 2	BSB60815 Advanced Diploma of Recordkeeping Release 1	Updates to codes and titles in the unit list	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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BSB60915 Advanced Diploma of Management (Human Resources)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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

PSPGEN067 Establish and maintain strategic networks

PSPPCM023 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) Release 2	BSB60915 Advanced Diploma of Management (Human Resources) Release 1	Updates to codes and titles in the unit list	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 3	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 2.0. Version created to correct typographical error in unit list.
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

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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
- 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

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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

BSBMGT624 Develop and implement 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

PSPGEN067 Establish and maintain strategic networks

PSPPCM023 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 Release 3	BSB61015 Advanced Diploma of Leadership and Management Release 2	Updates to codes and titles in the unit list	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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BSB61115 Advanced Diploma of Conveyancing

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 5.0. Version created to update Elective Unit list.
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
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:

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- 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.

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

FNSACC413 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

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BSBITS411 Maintain and implement digital 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

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

BSBWHS414 Contribute to WHS risk management

BSBWOR501 Manage personal work priorities and professional development

Qualification Mapping Information

Supersedes and is equivalent to FNS60311 Advanced Diploma of Conveyancing.

Links

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

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BSB61218 Advanced Diploma of Program Management

Modification History

Release	Comments
Release 1	This qualification first released with BSB Business Services Training Package Version 3.0.

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

BSBPMG621 Facilitate stakeholder engagement

BSBPMG622 Implement program governance

BSBPMG623 Manage benefits

Elective Units

AHCBUS607 Implement a monitoring, evaluation and reporting program

BSBFIM601 Manage finances

BSBINN601 Lead and manage organisational change

BSBLDR511 Develop and use emotional intelligence

BSBMGT520 Plan and manage the flexible workforce

BSBPMG615 Manage program delivery

BSBPMG616 Manage program risk

BSBPMG617 Provide leadership for the program

BSBPMG624 Engage in collaborative alliances

ICTICT602 Develop contracts and manage contracted performance

ICTICT606 Develop communities of practice

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PSPMGT006 Develop a business case

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB61218 Advanced Diploma of Program Management	BSB61215 Advanced Diploma of Program Management	Updates to core and elective units	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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BSB61315 Advanced Diploma of Marketing and Communication

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the role of individuals who provide leadership and strategic direction in the marketing and communications 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 and communications field. Typically they are accountable for group outcomes and the overall performance of the marketing and communication, advertising or public relations functions of an organisation.

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 individuals who:

- *have completed all core units in BSB52415 Diploma of Marketing and Communication.*

Packaging Rules

Total number of units = 12

3 core units plus

9 elective units, of which:

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- 8 elective units must be selected from the electives listed below
- the remaining elective unit may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at Advanced Diploma or Graduate Certificate or 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

BSBADV602 Develop an advertising campaign

BSBMGT616 Develop and implement strategic plans

BSBMKG609 Develop a marketing plan

Elective Units

BSBADV603 Manage advertising production

BSBADV604 Execute an advertising campaign

BSBADV605 Evaluate campaign effectiveness

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

BSBINM601 Manage knowledge and information

BSBINN601 Lead and manage organisational change

BSBIPR601 Develop and implement strategies for intellectual property management

BSBMGT605 Provide leadership across the organisation

BSBMGT608 Manage innovation and continuous improvement

BSBMGT615 Contribute to organisation development

BSBMGT617 Develop and implement a business plan

BSBMKG523 Design and develop an integrated marketing communication plan

BSBMKG603 Manage the marketing process

BSBMKG605 Evaluate international marketing opportunities

BSBMKG606 Manage international marketing programs

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BSBMKG607 Manage market research

BSBMKG608 Develop organisational marketing objectives

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

PSPGEN067 Establish and maintain strategic networks

PSPPCM023 Manage strategic contracts

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB61315 Advanced Diploma of Marketing and Communication Release 2	BSB61315 Advanced Diploma of Marketing and Communication Release 1	Updates to codes and titles in the unit list	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

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

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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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BSB80515 Graduate Certificate in Management (Learning)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

This qualification reflects the roles of individuals who apply substantial specialised skills and knowledge in the field of learning and capability development. In these roles they make significant high level independent judgements in major planning, design, operational and management functions within highly varied or specialised contexts.

The qualification may also relate to professionals or mangers in registered training organistions (RTOs) seeking to advance organisational learning and capability.

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 = 4

2 core units plus

2 elective units, of which:

- 1 elective unit must be selected from Group A elective units

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- one further elective unit may be selected from Group A or Group B or from any currently endorsed Training Package or accredited course at Advanced Diploma 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.

Core Units

BSBLDR801 Lead personal and strategic transformation

BSBLED802 Lead learning strategy implementation

Group A Elective Units

BSBITB801 Implement advanced electronic technologies

BSBLDR803 Develop and cultivate collaborative partnerships and relationships

BSBLED805 Plan and implement a mentoring program

BSBLED806 Plan and implement a coaching strategy

BSBLED807 Establish career development services

BSBLED808 Conduct a career development sesssion

BSBLED809 Identify and communicate trends in career development

TAELED803 Implement improved learning practice

TAELED804 Review enterprise e-learning systems and solutions implementation

Group B Elective Units

BSBFIM501 Manage financial resources

BSBINN501 Establish systems that support innovation

BSBINN601 Lead and mange organisational change

PSPMGT012 Facilitate knowledge management

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB80515 Graduate Certificate in Management (Learning)	BSB80515 Graduate Certificate in Management (Learning)	Updates to codes and titles in the unit list	Equivalent qualification

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Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
Release 2	Release 1		

Links

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

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BSB80615 Graduate Diploma of Management (Learning)

Modification History

Release	Comments
Release 2	This qualification first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This qualification first released with BSB Business Services Training Package Version 2.0.

Qualification Description

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

This qualification may apply to leaders and managers in an organisation where learning is used to build organisational capability.

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

2 core units plus

6 elective units, of which:

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

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- the remaining 2 units may be selected from the elective units listed below or any other currently endorsed training package or accredited course at Advanced Diploma 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.

Core Units

BSBINN801 Lead innovative thinking and practice

BSBRES801 Initiate and lead applied research

Elective Units

BSBFIM801 Manage financial resources

BSBINN501 Establish systems that support innovation

BSBINN601 Lead and mange organisational change

BSBITB801 Implement advanced electronic technologies

BSBLDR801 Lead personal and strategic transformation

BSBLED802 Lead learning strategy implementation

BSBLED805 Plan and implement a mentoring program

BSBLED806 Plan and implement a coaching strategy

BSBLED807 Establish career development services

BSBLED808 Conduct a career development session

BSBLED809 Identify and communicate trends in career development

BSBLDR803 Develop and cultivate collaborative partnerships and relationships

PSPMGT012 Facilitate knowledge management

TAELED803 Implement improved learning practice

TAELED804 Review enterprise e-learning systems and solutions implementation

Qualification Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSB80615 Graduate Diploma of Management (Learning)	BSB80615 Graduate Diploma of Management (Learning)	Updates to codes and titles in the unit list	Equivalent qualification

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Code and title current version	Code and title previous version	Comments	Equivalence status
Release 2	Release 1		

Links

Companion 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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BSBWHS307 Apply knowledge of WHS laws in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to understand work health and safety (WHS) laws, and comply with them in one's own workplace.

The unit applies to those who contribute to compliance with WHS laws as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

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

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ELEMENTS	PERFORMANCE CRITERIA
1. Identify WHS legal and compliance framework as it applies to the workplace	1.1 Identify and access current standards and WHS laws relevant to the workplace, occupation and industry 1.2 Apply knowledge of relationship between WHS laws and related documentation to assist in identifying WHS legislative requirements in the workplace 1.3 Identify consequences of non-compliance with WHS laws and organisational WHS policies, procedures, processes and systems 1.4 Identify duty holders and their role in the workplace 1.5 Identify legal obligations and duties about who to consult with regarding training of workers and health and safety representatives
2. Contribute to WHS legislative compliance	2.1 Assist in monitoring workplace compliance with WHS laws according to organisational policies and procedures 2.2 Contribute to ensuring that workplace complies with WHS laws 2.3 Identify and report non-compliance with WHS laws to relevant stakeholders according to organisational policies and procedures 2.4 Identify limits of own expertise and legal duties, and access help and advice when required
3. Maintain current knowledge of WHS laws and publications	3.1 Identify and access sources to keep up to date with WHS laws and WHS-related publications within scope of own role 3.2 Communicate information about relevant legislative changes and publications to others according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Identifies and evaluates information from sources to update knowledge

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Skill	Description
Reading	• Interprets a range of textual information to determine regulatory and procedural requirements, and associated necessary actions
Writing	• Documents WHS information in a sequential manner using required format, correct grammar and industry-specific language
Oral communication	• Provides information and advice using language appropriate to audience and context • Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	• Follows policies, procedures and legislative requirements relevant to own role
Interact with others	• Selects appropriate communication protocols and conventions to provide and seek information
Get the work done	• Plans, sequences and prioritises tasks and activities to support compliance with WHS legislative requirements • Uses main features and functions of technology to complete work tasks and access information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS302 Apply knowledge of WHS legislation in the workplace.

Links

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

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Assessment Requirements for BSBWHS307 Apply knowledge of WHS laws in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- identify and apply at least two different standards or work health and safety (WHS) laws relevant to own work role, workplace and industry.

During the above, the candidate must:

- communicate WHS information to others
- refer any identified non-compliances with WHS laws to responsible persons or authorities
- seek advice from relevant stakeholders if any non-compliance matters are identified that are outside own expertise and legal duties.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS legislative duties of self and others, including limits of own expertise
- organisational WHS policies, procedures, processes and systems for:
  - monitoring workplace compliance with WHS laws
  - identifying and reporting non-compliance with WHS laws
  - communicating WHS-related information
- requirements of commonwealth and state/territory WHS laws, standards and guidance material, and publications relevant to own work role, workplace and industry
- obligations and duties relating to consultation regarding training of workers, and health and safety representatives, including who must be consulted
- consequences of non-compliance with WHS laws, related documentation and organisational WHS policies, procedures, processes and systems

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- individuals and duty holders to access for advice and accountability about WHS compliance
- sources of information about compliance with legislation.

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, procedures and plans relating to compliance requirements specified in the performance evidence
- WHS laws, licensing requirements and standards relevant to the work of the unit
- guidance materials and alerts issued by the relevant WHS regulator
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to participate in the processes of work health and safety (WHS) hazard identification, risk assessment and risk control. It includes participating in worker consultation and support to contribute to a healthy and safe workplace.

The unit applies to those who assist with identifying workplace hazards and assessing and controlling WHS risks as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Participate in WHS hazard identification in the workplace	1.1 Participate in selecting hazard identification methods for the workplace according to organisational policies and procedures 1.2 Use selected methods to identify, report and record hazards according to organisational policies and procedures, standards and WHS laws 1.3 Provide information and assistance to required personnel during hazard identification process
2. Participate in WHS risk assessment	2.1 Participate in selecting suitable risk assessment methods for the workplace according to organisational policies and procedures 2.2 Assess and record risks using selected methods according to organisational procedures, standards and WHS laws 2.3 Provide information and assistance to required personnel during risk assessment process
3. Contribute to developing and implementing WHS control measures	3.1 Obtain organisation records of the outcomes of hazard identifications and risk assessments, and use them to participate in developing risk control options 3.2 Identify duty holders according to WHS laws and organisational WHS policies, procedures, processes and systems 3.3 Participate in selecting risk control options using criteria agreed to by work team, and according to organisational policies, procedures, processes and systems 3.4 Identify and report factors impeding successful implementation of selected risk control options to determine potential control measures to be implemented 3.5 Review and document potential control measures for compliance with relevant WHS laws 3.6 Contribute to developing a risk control implementation plan according to the hierarchy of control measures 3.7 Provide written information to individuals and duty holders to facilitate implementation of reviewed control measures
4. Contribute to consultative arrangements for hazard	4.1 Assist engaging work team in hazard identification and risk assessment according to organisational WHS

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ELEMENTS	PERFORMANCE CRITERIA
identification and risk assessment activities	consultation and participation policies, procedures and processes 4.2 Respond to issues raised according to organisational procedures and processes 4.3 Develop plan to encourage others to participate in hazard identification and risk assessment activities, according to organisational policies and procedures
5. Contribute to consultative arrangements for implementing control measures	5.1 Assist with implementing consultative processes that engage work team in developing and implementing control measures, according to organisational WHS consultation and participation policies, procedures and processes 5.2 Respond to issues raised according to organisational policies and procedures for issue resolution 5.3 Promote worker participation in arrangements for implementing control measures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and identifies information from WHS laws, workplace policies, procedures and records
Writing	• Uses structure and language appropriate to audience and context in plans, reports and general advice
Oral communication	• Presents information and assistance using appropriate industry-specific vocabulary • Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	• Follows regulatory responsibilities, and organisational policies and procedures in relation to WHS responsibilities • Keeps up to date with changes to WHS laws, and organisational policies and procedures relevant to own role
Interact with others	• Identifies what to communicate and to whom in a range of contexts • Cooperates with others as part of WHS activities and contributes to specific activities requiring joint responsibility and accountability • Shares information and resources, offers assistance voluntarily and provides feedback when requested

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Skill	Description
	• Plays an active role in group discussions, paying attention to perspectives of others and encouraging participation
Get the work done	• Plans and implements tasks to achieve required outcomes • Uses decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria in the WHS risk-management process

Unit Mapping Information

Supersedes and is equivalent to BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit and, on at least two occasions, to:

- participate in selecting and using required methods to identify, report and record hazards
- assess and record risks for identified hazards
- promote and support worker consultation and participation in hazard identification and risk assessment
- participate in developing, selecting and implementing risk control options and plans for identified hazards.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- work health and safety (WHS) legislative requirements, regulations, codes of practice and standards relating to:
  - WHS hazard identification, risk assessment and risk control
  - WHS hazard communication, consultation and participation
  - identifying duty holders
  - recordkeeping
  - specific hazard identification, risk assessment and control methods
- internal and external sources of WHS information and data, and procedures for accessing them
- concept of hazards, risks and risk factors
- basic principles of incident causation and injury processes
- WHS organisational policies and procedures relating to identifying hazards, and assessing and controlling risks:

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- WHS hazards that may be present in the workplace, the harm they can cause and how this harm occurs
- types of hazard and risk registers
- responding to WHS issues, including risk control options for different hazards and work situations, and suitable risk assessment methods
- workplace communication processes for reporting and recording, and plans for sharing information about hazard identification, risk assessment and risk control.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures and plans required for the performance evidence
- WHS laws relevant to hazard identification, risk assessment and risk control
- relevant WHS data files
- opportunities for interaction with others
- workplace equipment and resources required to demonstrate the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS309 Contribute effectively to WHS communication and consultation processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to work health and safety (WHS) communication and consultation in the workplace. It involves communicating WHS information to required personnel, and taking appropriate follow-up action to assist in ensuring that communication and consultation processes are effective and conducive to others in the workplace who raise WHS issues.

The unit applies to those who contribute to WHS communication and consultation as part of their work health and safety responsibilities, which are in addition to their main duties.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Participate in establishing consultation processes	1.1 Contribute to selecting WHS consultation and communication methods aligned to organisational policies and procedures, and compliant with WHS legislative requirements 1.2 Identify and record key stakeholders according to WHS laws and related documentation 1.3 Research and collate information on organisational WHS obligations relating to communication and consultation with required personnel 1.4 Assist with any required revisions to consultation and communication methods according to organisational policies and procedures 1.5 Participate in consultation with required personnel to agree any proposed consultation and communication methods
2. Contribute to WHS consultation	2.1 Contribute to facilitating WHS consultation and participation processes according to WHS laws 2.2 Identify and report barriers to effective WHS consultation and participation processes to required personnel according to organisational policies and procedures 2.3 Make suggestions that could assist in removing identified barriers to effective WHS consultation and participation processes, according to organisational policies and procedures 2.4 Identify, record and communicate to others, the duties, rights and responsibilities of required personnel in the consultation process
3. Consult and communicate effectively with required personnel	3.1 Identify appropriate forms of communication for required individuals and/or parties 3.2 Convey WHS information to required personnel in plain language and according to organisational policies and procedures 3.3 Participate in confirming that required personnel understand WHS information, instructions and signs
4. Raise WHS issues with required personnel	4.1 Raise relevant WHS issues in meetings and support others to do so 4.2 Record and communicate WHS discussions and their outcomes according to organisational policies and procedures

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ELEMENTS	PERFORMANCE CRITERIA
	4.3 Follow up meeting outcomes according to own job role, and organisational policies and procedures 4.4 Communicate WHS-related outcomes of meetings to required individuals and/or parties

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets a range of textual information to determine regulatory and procedural requirements, and associated necessary actions
Writing	• Records key information in a sequential manner using required format, correct grammar and industry-specific vocabulary
Oral Communication	• Presents information using language and non-verbal communication appropriate to audience and context • Uses questioning and listening techniques to obtain feedback from others and to resolve issues
Navigate the world of work	• Follows policies, procedures and legislative requirements relevant to own role
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts • Uses appropriate interpersonal skills to promote contributions and encourage ideas from others
Get the work done	• Sequences and schedules activities, and assists with their implementation and communication • Identifies barriers to consultation and applies problem-solving processes to assist with determining possible solutions • Uses main features and functions of digital tools to access information and communicate effectively

Unit Mapping Information

Supersedes and is equivalent to BSBWHS304 Participate effectively in WHS communication and consultation processes.

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Links

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Assessment Requirements for BSBWHS309 Contribute effectively to WHS communication and consultation processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to two different work health and safety (WHS) communication and consultation processes.

During the above, the candidate must:

- communicate WHS information to others
- raise WHS issues in meetings and follow up on outcomes
- take appropriate actions to assist with removing any barriers to communication and consultation processes identified during above processes
- support others to raise relevant WHS issues.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- purpose of organisational WHS policies, procedures, processes and systems
- organisational WHS obligations relating to communication and consultation
- commonwealth and state/territory WHS laws and publications relating to:
  - identifying and recording key stakeholders
  - WHS communication and consultation processes
- organisational policies and procedures relating to:
  - consultation and communication methods, and processes for revising them
  - addressing barriers to effective WHS consultation and participation processes, including barrier reporting protocols
  - recording and communicating WHS discussions

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- elements of WHS communication and consultation:
  - potential barriers to WHS consultation and participation processes, and methods to overcome them
  - roles and responsibilities of WHS personnel
  - how the consultation process influences and is related to workplace information management procedures, processes and systems
  - methods to engage others with workplace procedures, and information sourcing and sharing.
  -

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures, plans and procedures with information about compliance requirements required to demonstrate the performance evidence
- required WHS laws and data files to contribute to WHS communication and consultation processes
- opportunities for interaction with others
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS310 Contribute to WHS issue-resolution processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to work health and safety (WHS) issue-resolution processes, and to communicate their outcomes.

It applies to individuals who contribute to the resolution of WHS issues in the workplace as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to the	1.1 Identify relevant standards, WHS laws and organisational

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ELEMENT	PERFORMANCE CRITERIA
development of WHS issue-resolution processes	policies, procedures, processes and systems that apply to the resolution of WHS issues 1.2 Review sufficiency of existing issue-resolution processes and compliance with WHS laws and related documentation 1.3 Identify participants in the WHS issue-resolution process 1.4 Assist with identifying and documenting the legal rights, duties and responsibilities of relevant individuals and/or parties 1.5 Assist with identifying techniques and strategies that can be used to resolve WHS issues
2. Contribute to the assessment of WHS issues	2.1 Participate in identifying and assessing WHS issues within scope of own role 2.2 Provide support and advice to participants in WHS issue-resolution process as required and according to organisational policies, procedures, processes and systems 2.3 Assess and identify appropriate timeframes for the resolution of WHS issues, seeking assistance where appropriate 2.4 Contribute to the documentation of WHS issues 2.5 Seek feedback from required stakeholders to improve WHS issue-resolution processes
3. Assist with communicating outcomes of WHS issue-resolution processes	3.1 Analyse communication methods to determine most suitable method for distributing outcomes of WHS issue-resolution processes according to organisational policies, procedures, processes and systems 3.2 Assist with distributing the outcomes of WHS issue-resolution processes to relevant stakeholders according to selected communication method 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	Description
Reading	• Interprets relevant sections of WHS laws, workplace policy and procedures

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Skill	Description
	• Interprets WHS documentation relevant to own role
Writing	• Uses structure and language appropriate to audience and context in plans, summaries, reports and advice
Oral communication	• Presents information, provides assistance and engages in discussions using language and non-verbal communication appropriate to audience and context • Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS role • Keeps up to date with changes to WHS laws and organisational policies and procedures relevant to own role
Interact with others	• Identifies what to communicate and to whom in an issue-resolution process • Cooperates with others as part of WHS issue-resolution activities and contributes to specific activities requiring joint responsibility and accountability • Plays an active role in group discussions and pays attention to perspectives of others when trying to reach agreement • When unable to resolve an issue, seeks advice and assistance according to organisational policies and procedures
Get the work done	• Plans and implements tasks to achieve required outcomes • Uses technology and programs to assist with planning, implementing and tracking progress • Uses decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria in selecting means of communication

Unit Mapping Information

Supersedes and is equivalent to BSBWHS305 Contribute to WHS issue resolution.

Links

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

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Assessment Requirements for BSBWHS310 Contribute to WHS issue-resolution processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two occasions, contribute to a WHS issue-resolution process in a work area.

During the above, the candidate must contribute to:

- identifying standards, WHS laws, and organisational policies and procedures relevant to the process
- identifying possible participants and their roles and responsibilities
- using suitable methods to communicate with participants in the issue-resolution process
- providing support to others about WHS issue-resolution tools, techniques and strategies
- recording WHS issues and outcomes.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- sources of WHS information and data, and how to access them
- standards and legislative requirements applicable to WHS issue resolution, including:
  - information provision
  - data collection
  - consultation
  - reporting
  - recordkeeping
  - privacy and confidentiality
- organisational policies, procedures, processes and systems relating to WHS agreements and issue resolution

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- roles and responsibilities of individuals and/or parties involved in performance evidence under WHS laws
- WHS issue-resolution tools, techniques and strategies.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, procedures and plans
- relevant standards, WHS laws, licensing requirements
- workplace equipment and resources required for the performance evidence
- opportunities for interaction with others
- case studies and, where possible, actual workplace situations requiring issue resolution.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS331 Participate in identifying and controlling hazardous chemicals

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to identify and control hazardous chemicals in the workplace. It requires knowledge of the potential hazards associated with chemicals and how to work safely with them. It involves supporting workplace safety by communicating information about hazardous chemicals using established consultation methods.

The unit applies to those who participate in identifying chemicals as part of their WHS responsibilities, which are in addition to their main duties. It applies to hazardous chemicals with the potential to harm human health, which may be solids, liquids or gases; pure substances or mixtures. When used in the workplace, these substances can generate vapours, fumes, dusts and mists.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Apply information relating to identifying hazardous chemicals	1.1 Identify and follow WHS laws and guidance notes in relation to the safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals used in the workplace 1.2 Identify and follow safety data sheets (SDSs) and other guidance to determine the potential health effects of worker exposure to hazardous chemicals 1.3 Identify and follow SDSs and other guidance to determine methods to control worker exposure to hazardous chemicals
2. Identify presence and use of hazardous chemicals in the workplace	2.1 Apply organisational inspection techniques to identify and document hazardous chemicals in the workplace 2.2 Participate in consultation processes with workers to identify hazardous chemicals in the workplace 2.3 Identify tasks that may expose workers to hazardous chemicals used in the workplace
3. Contribute to the control of hazardous chemicals in the workplace	3.1 Use WHS laws and guidance notes in relation to hazardous chemicals to identify controls to remove or reduce worker exposure 3.2 Assess effectiveness of current control measures according to WHS laws, guidance notes, and organisational policies and procedures 3.3 Participate in selecting additional control measures for implementation, as required 3.4 Assist in implementing procedures for safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals 3.5 Contribute to ensuring control measures are maintained according to organisational procedures
4. Support worker consultation methods for hazardous chemicals	4.1 Communicate information about identified hazardous chemicals, and support required personnel at risk of exposure to them 4.2 Gather information about exposure to hazardous chemicals and possible health effects reported by workers 4.3 Report gathered information to required parties including

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ELEMENTS	PERFORMANCE CRITERIA
	duty holders

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Locates information from WHS laws, and workplace policies, procedures and records
Writing	• Uses structure and language appropriate to audience and context in plans, reports, and general advice
Oral communication	• Presents information and assistance using appropriate levels of industry-specific vocabulary • Uses listening and questioning to clarify and confirm understanding
Navigate the world of work	• Follows legal and regulatory guidance and organisational policies and procedures in hazardous chemicals • Keeps up to date with changes to WHS laws, and organisational policies and procedures relevant to own role
Interact with others	• Identifies what to communicate and to whom in a range of contexts • Cooperates with others as part of WHS activities and contributes to specific activities requiring joint responsibility and accountability • Shares information and resources, offers assistance voluntarily, and provides feedback when requested • Plays an active role in group discussions, paying attention to perspectives of others and encouraging participation
Get the work done	• Plans and implements tasks to achieve required outcomes • Uses decision-making processes, setting or clarifying goals, gathering information to identify hazardous chemicals

Unit Mapping Information

No equivalent unit. New unit.

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Links

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

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Assessment Requirements for BSBWHS331 Participate in identifying and controlling hazardous chemicals

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- participate in:
  - identifying two hazardous chemicals in the workplace
  - selecting and implementing risk control options for each of the two identified chemicals
- on at least two occasions, promote and support worker consultation and participation in hazardous chemical identification.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- requirements of commonwealth and state/territory WHS laws and publications relating to identifying and controlling hazardous chemicals:
  - communication, consultation and participation
  - notification of incidents
  - recordkeeping
  - identification, risk assessment and control methods
  - basic principles of incident causation and injury processes
- organisational policies and procedures relating to identifying and controlling hazardous chemicals:
  - inspection techniques used to identify and document them
  - controls to remove or reduce worker exposure
  - assessing effectiveness of control measures
  - ensuring use and maintenance of control measures
- internal and external sources of WHS information and data:

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  - safety data sheets (SDSs)
  - risk control options for hazardous chemicals and work situations
- WHS hazards that may be present in the workplace:
  - harm they can cause, and how this harm occurs
  - potential hazards associated with the chemicals described in the performance evidence, including environmental, fire, health and reactivity
- types of hazard and risk registers, and their key components
- requirements of workplace communication processes for sharing information about hazard identification, and risk assessment and control measures.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken in the regulation, licensing and risk associated with working with hazardous chemicals, and must include access to:

- workplace equipment, technology, software and consumables required to implement and maintain internal control procedures
- corporate governance documentation required for role
- case studies and, where possible, actual workplace situations
- opportunities for interaction with others
- organisational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS332X Apply infection prevention and control procedures to own work activities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 6.1.

Application

This unit describes the skills and knowledge required to undertake work activities in compliance with organisational procedures that prevent and control infection. It involves implementing standard and transmission-based precautions, identifying infection hazards, and assessing and responding to infection risks.

The unit applies to all workers required to undertake their activities in compliance with the infection prevention and control procedures in place in their workplace.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Unit Sector

Cross-Sector – Infection Prevention and Control

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to undertake work activities in a manner that supports infection prevention and control	1.1 Identify job requirements 1.2 Identify organisational infection prevention and control procedures relating to identified job requirements 1.3 Identify infection hazards associated with work activities and environment and assess the risk

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ELEMENT	PERFORMANCE CRITERIA
	according to organisational procedures 1.4 Identify and implement infection prevention and control measures relating to identified hazards within scope of own role and responsibilities and according to organisational procedures
2. Undertake work activities in a manner that supports infection prevention and control	2.1 Use resources and equipment according to organisational infection prevention and control procedures and manufacturer specifications 2.2 Clean and maintain own work area according to organisational infection prevention and control procedures 2.3 Respond to infection prevention and control hazards and non-compliance arising in the course of activities, within scope of own role or escalate to required personnel 2.4 Respond to exposure to infection of self or others according to organisational procedures and within required timeframes
3. Finalise work activities according to organisational infection prevention and control requirements	3.1 Maintain and store resources and equipment used in the course of own activities according to organisational infection prevention and control procedures and manufacturer specifications 3.2 Dispose of waste and confine contaminated resources or equipment according to organisational infection prevention and control procedures 3.3 Complete incident reports and convey to required personnel according to organisational procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Oral communication	• Explains an infection hazard or non-compliance to required personnel, using suitable words and terms and responding clearly to specific enquiries • Listens to and interprets information relevant to own role in relation to infection prevention and control

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Skill	Description
Reading	• Interprets information in a range of workplace procedures essential to infection prevention and control in own role
Writing	• Records easy-to-read information relating to workplace hazards and incidents, using words and terms appropriate to audience and purpose
Initiative and enterprise	• Identifies both obvious and less evident hazards to self and others
Problem solving	• Identifies and applies infection prevention and control measures suited to own role and work environment

Unit Mapping Information

No equivalent unit.

Links

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

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Assessment Requirements for BSBWHS332X Apply infection prevention and control procedures to own work activities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 6.1.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply organisational infection prevention and control procedures to own work activities on at least three different occasions
- identify at least two different infection hazards, assess the risk they pose, and respond to each within scope of own role and responsibilities and according to organisational infection prevention and control procedures.

In the course of the above, the candidate must:

- demonstrate the use of required precautions and control measures, as required for own work activities
- confine at least one resource or piece of equipment that is suspected of being contaminated, according to organisational infection prevention and control procedures
- dispose of waste according to organisational infection prevention and control procedures.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- nature and types of infection-related hazards in own work environment
- chain of infection:
  - source of infectious agent
  - mode of transmission
  - susceptible host and factors that increase susceptibility
- key modes of disease transmission – contact, airborne and droplet:
  - paths of transmission, including direct contact, aerosols and penetrating injuries

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  - risk of acquisition
  - sources of infecting microorganisms, including persons who are carriers, in the incubation phase of the disease or those who are acutely ill
- precautions and control measures for infection hazards associated with own role and work activities, including standard and transmission-based precautions:
  - required personal health and hygiene, including:
    - checking and reporting indicators of own ill health
    - respiratory hygiene and cough etiquette
    - hand hygiene: procedures for hand washing and hand rubbing; and situations requiring the use of soap and water or alcohol-based hand rub
    - guidelines on maintaining fingernails and intact skin
    - guidelines on wearing jewellery and watches
    - social distancing measures
- organisational procedures relating to own role and work activities, including for:
  - identifying hazards associated with own work activities and workplace environment, including infection-related hazards
  - assessing risks associated with identified hazards, including determining the likelihood and severity of harm
  - reporting hazards that put self and others at risk, including infection hazards
  - identifying, sourcing and checking the serviceability of PPE required in own role and work activities:
    - eye protection: protective glasses or goggles
    - gloves
    - masks or face shields
    - protective clothing and footwear
  - completing incident reports
- organisational infection prevention and control procedures relating to own role, work activities and physical environment, including for:
  - escalating hazard prevention and control matters outside scope of own role
  - handling, transporting, reprocessing or processing resources and equipment used in the course of own work activities in a manner that:
    - prevents skin and mucous membrane exposure, contamination and transfer of pathogens
    - limits contamination of resources and equipment
    - controls the spread of infection
  - handling and disposing of waste relating to own work activities, including contaminated waste
  - environmental cleaning of own work area, including cleaning and disinfecting surfaces: procedures and specified schedules
  - confining contaminated resources and equipment to designated areas
  - confining workplace records and materials to clean areas
  - responding to exposure to infection of self or others, including to body fluids

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- infection prevention and control protocols required by own work activities:
  - placing appropriate signs when and where appropriate
  - removing spills
  - separating and maintaining clean and contaminated areas
- manufacturer specifications relating to resources and equipment used and maintained in the course of own work activities.
-

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- suitable facilities, equipment and resources, including:
  - organisational infection prevention and control procedures and guidelines
  - PPE suited to work role and job requirements
  - hygiene facilities and equipment relevant to workplace
  - waste disposal equipment suited to waste generated during work activities
  - areas for cleaning.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS412 Assist with workplace compliance with WHS laws

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to assist with establishing and maintaining workplace compliance with work health and safety (WHS) laws. It includes identifying applicable WHS laws, duties, rights and obligations, and the necessary actions to ensure WHS compliance in the workplace.

It also includes assisting with providing advice about the legislative duties, rights and obligations of individuals and parties prescribed in WHS laws and those of WHS regulators.

The unit applies to those working in a broad range of WHS roles across all industries.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Assist with identifying the legal framework for WHS in the workplace	1.1 Access current WHS laws and related documentation relevant to organisation's operations 1.2 Assist with analysing accessed information to determine legal requirements in the workplace 1.3 Assist with identifying and confirming duties, rights and obligations of individuals and/or parties as specified in WHS laws 1.4 Assist with seeking advice from legal advisers as required
2. Assist with providing advice about WHS compliance	2.1 Assist individuals and/or parties to locate information about their WHS duties, rights and obligations 2.2 Assist with providing advice to individuals and/or parties about their WHS duties, rights and obligations, within scope of own role 2.3 Assist with providing advice to individuals and/or parties about the functions and powers of the WHS regulator and workplace regulatory compliance matters
3. Assist with establishing WHS legislative compliance	3.1 Assist with assessing workplace compliance with relevant WHS laws 3.2 Assist with reporting on outcomes of compliance assessment 3.3 Assist with determining and documenting recommendations that address identified non-compliance 3.4 Assist with determining related WHS training needs of work team, and with providing the WHS training to meet legislative and organisational requirements
4. Assist with maintaining WHS legislative compliance	4.1 Assist with developing or modifying workplace policies, procedures, processes and systems that support compliance according to organisational policies and procedures, and WHS legislative requirements 4.2 Assist with communicating developed or modified workplace policies, procedures, processes and systems 4.3 Assist with monitoring implementation of developed or modified workplace policies, procedures, processes and systems to ensure legislative compliance

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Reviews and interprets at times complex WHS legislative and organisational texts
Writing	• Documents WHS advice using structure, layout and language suitable for audience • Drafts, documents, and updates policies, procedures and processes according to requirements and using appropriate vocabulary and register
Oral communication	• 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	• Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to own WHS role and responsibilities • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• 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	• Uses combination of logical planning and intuitive understanding of context to identify relevant information and hazards, and to evaluate alternative strategies in relation to WHS compliance • Uses decision-making processes in relation to WHS compliance: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria

Unit Mapping Information

Supersedes and is equivalent to BSBWHS402 Assist with compliance with WHS laws.

Links

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

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Assessment Requirements for BSBWHS412 Assist with workplace compliance with WHS laws

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- assist with establishing workplace compliance with work health and safety (WHS) laws in relation to at least two different compliance matters and within scope of own role.

During the above, the candidate must assist with:

- identifying current WHS legal requirements for the workplace
- providing advice about current WHS legal requirements for the workplace
- assessing and maintaining workplace compliance with WHS legislative requirements
- making recommendations for implementing workplace changes in order to achieve WHS legal compliance
- monitoring compliance with WHS laws according to organisational policies and procedures.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information, and procedures for accessing them
- duties, rights and obligations of work team as specified in WHS laws, and location of relevant information about WHS laws
- functions and powers of relevant WHS regulator and how they are exercised
- regulatory compliance matters, including objectives and principles underpinning WHS laws
- methods used for:
  - assessing and maintaining WHS compliance
  - determining training needs in relation to WHS compliance

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  - implementing changes to policies, procedures, processes and systems to achieve WHS compliance
- organisational policies and procedures for:
  - documenting compliance requirements
  - assessing WHS compliance obligations and processes to address non-compliance
  - recording and documenting compliance assessment.
  -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and organisational documentation required to demonstrate the performance evidence
- reports from individuals and parties consulted about WHS compliance
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to implementing and maintaining work health and safety (WHS) consultation and participation as prescribed in legislation.

It also covers contributing to communicating relevant information, identifying feedback opportunities, and improving consultation and participation.

The unit applies to those working in a broad range of WHS roles across all industries.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify individuals and parties, and their roles and responsibilities for WHS consultation and participation	1.1 Apply knowledge of relevant parts of WHS laws, policies and procedures as they apply to WHS consultation and participation 1.2 Identify individuals with roles, duties, rights and responsibilities regarding WHS consultation and participation according to organisational policies and procedures 1.3 Identify own role, duties, rights and responsibilities regarding WHS consultation and participation as appropriate to work area 1.4 Communicate roles, duties, rights and responsibilities to individuals and/or parties according to organisational policies and procedures
2. Contribute to implementing WHS consultation and participation processes	2.1 Identify established organisational WHS consultation and participation processes 2.2 Identify required personnel to participate in WHS consultation 2.3 Contribute to setting up and implementing WHS consultation processes as appropriate to own role and work area 2.4 Create opportunities for participating individuals and/or parties to provide feedback on WHS consultation processes 2.5 Document consultation opportunities according to organisational policies and procedures 2.6 Promote and support participation of individuals and/or parties in WHS consultation processes as appropriate to own 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 Identify training requirements for individuals and/or parties necessary for effective WHS consultation and participation 3.3 Contribute to and participate in sharing WHS information and data as appropriate to own role and

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ELEMENTS	PERFORMANCE CRITERIA
	work area 3.4 Create methods to ensure WHS information and data is accessible to required personnel in work area 3.5 Record and store WHS information and data according to organisational policies and procedures
4. Contribute to assessment of WHS consultation and participation feedback processes	4.1 Identify consultation and participation methods for gathering and documenting feedback on processes from individuals and/or parties 4.2 Contribute to assessing opportunities for individuals and/or parties to express their views during consultation and participation 4.3 Document outcomes from assessment of feedback processes and communicate outcomes to relevant stakeholders according to organisational policies and procedures
5. Contribute to improving WHS consultation and participation processes	5.1 Contribute to identifying and assessing barriers to, and opportunities for improving, implementation and effectiveness of WHS consultation and participation processes 5.2 Contribute to developing, implementing and evaluating measures to remove barriers and improve processes 5.3 Communicate improvements to required personnel according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Reviews and interprets WHS legislative and organisational texts
Writing	• Uses structure, layout and language suitable for audience to draft and document consultation and participation processes • Records required WHS information using appropriate organisational formats
Oral	• Uses structure and language suitable for audience to provide relevant

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Skill	Description
communication	WHS organisational information • Uses questioning and active listening to identify and discuss feedback requirements, and barriers to and opportunities for improving WHS consultation processes
Navigate the world of work	• Adheres to legal and regulatory responsibilities in relation to own WHS role and responsibilities • Keeps up to date on changes to WHS laws and regulations relevant to own role
Interact with others	• Identifies what, with whom and how to communicate in the context of consultation and participation processes • Uses a range of strategies to establish a sense of connection with others • Cooperates with others as part of WHS consultation and participation processes, and contributes to specific activities requiring joint responsibility and accountability • Initiates and contributes to facilitating consultative process, responding, explaining, clarifying and expanding on ideas and information as required
Get the work done	• Applies processes when organising consultation processes, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others • Contributes to implementing actions according to plans, making slight adjustments as necessary and addressing unexpected issues • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Uses familiar digital systems and tools to access, organise, analyse and present information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes.

Links

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

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Assessment Requirements for BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two occasions contribute to each of the following, as applicable to own role and work area:
  - implementing and maintaining work health and safety (WHS) consultation and participation to ensure that required personnel are encouraged to participate
  - communicating information and data about WHS consultation and participation processes
  - explaining to individuals and parties the legal roles, duties, rights and responsibilities of self and others regarding WHS consultation and participation processes
  - creating opportunities for feedback on consultation and participation processes
  - identifying barriers to, and opportunities for improving, effectiveness of WHS consultation and participation processes, and to implement and maintain improvement measures.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- requirements under WHS laws for consultation and participation processes, training requirements, and the roles and responsibilities of individuals and parties required to participate
- essential components of WHS consultation processes
- organisational policies and procedures for:
  - identifying and communicating WHS consultation and participation information
  - documenting consultation barriers, opportunities and feedback

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  - storing WHS information and data
- internal and external sources of WHS information and data, and procedures for accessing them
- key principles, uses and components of the hierarchy of control measures that assist with implementing and maintaining WHS consultation and participation processes
- methods for obtaining feedback from individuals and/or parties on consultation and participation processes.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment, technology, software and consumables required to access information about WHS laws
- WHS laws, organisational documentation, and personnel required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS414 Contribute to WHS risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to WHS risk management, which includes the processes for identifying work health and safety (WHS) hazards and assessing and controlling the risk relating to those identified hazards.

It involves contributing to the development, implementation and evaluation of risk controls according to legislative and organisational requirements.

The unit applies to those working in a broad range of roles across all industries. WHS hazard identification and risk control processes are those defined in written workplace procedures.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Access information and data used to identify hazards, and to assess and control risks	1.1 Access and review current WHS laws relevant to organisation's hazard identification and risk control processes 1.2 Access workplace sources of information and data to inform hazard identification, risk assessment and risk controls 1.3 Access external sources of information and data to inform hazard identification, risk assessment and risk controls 1.4 Analyse information and data and determine nature and scope of workplace hazards, risk assessment and risk controls 1.5 Confirm information and data with required stakeholders, seeking input from technical and other advisors as required
2. Contribute to identifying risk management requirements and compliance	2.1 Contribute to identifying and complying with requirements of organisational policies, procedures, processes and systems for hazard identification, risk assessment and risk controls 2.2 Contribute to identifying and complying with requirements of WHS laws and guidelines for hazard identification, risk assessment and risk controls 2.3 Identify duty holders, and their roles and responsibilities according to risk management requirements 2.4 Identify tools used by organisational in current hazard identification and risk control processes
3. Contribute to workplace hazard identification	3.1 Contribute to selecting hazard identification tools and techniques according to WHS laws, and risk management requirements 3.2 Use hazard identification tools and techniques to assist with identifying hazards according to risk management requirements 3.3 Contribute to documenting hazard identification processes and results according to risk management requirements 3.4 Apply knowledge of hazards to advise individuals and/or parties about workplace hazards and the harms they may

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ELEMENTS	PERFORMANCE CRITERIA
	cause
4. Contribute to WHS risk assessment	4.1 Identify individuals and/or parties at risk of exposure to hazards and determine the nature, severity and likelihood of potential harm 4.2 Contribute to applying tools, techniques and processes to identified hazards to assess risk, according to risk management requirements 4.3 Contribute to documenting risk assessment results according to risk management requirements 4.4 Contribute to communicating risk assessment outcomes with workers, contract workers, managers and technical specialists according to risk management requirements
5. Contribute to developing and implementing risk controls	5.1 Contribute to selecting risk controls for identified hazards based on the risk assessment 5.2 Document agreed risk controls according to risk management requirements 5.3 Contribute to developing risk controls according to the hierarchy of control measures and WHS laws 5.4 Contribute to implementing risk controls and seek supervisory advice as required by the circumstances 5.5 Support communication of information on risk controls and actions to required individuals and/or parties
6. Contribute to evaluating effectiveness of risk controls	6.1 Identify requirements for ensuring ongoing effectiveness of risk controls 6.2 Contribute to identifying measures that enable evaluation of effectiveness of risk controls 6.3 Document plan for monitoring effectiveness of risk controls according to organisational policies and procedures 6.4 Present and effectively communicate plan to required stakeholders according to risk management requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

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Skill	Description
Reading	• Locates, reviews and interprets WHS legislative and organisational texts and other external information and data
Writing	• Uses structure, layout and language suitable for audience to document WHS hazard identification and risk control processes • Uses appropriate organisational formats and industry-specific vocabulary to document hazards, risks, and risk controls
Oral communication	• Uses structure and language suitable for audience to communicate information and contribute ideas about WHS hazard identification and risk control processes
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS hazard identification and risk control processes • Keeps up to date with WHS laws, and related organisational policies and procedures relevant to own role • Uses appropriate technology in accessing, communicating, and recording information
Interact with others	• Identifies what, with whom and how to communicate in the context of advising about hazards, risks and risk controls • Cooperates with others as part of WHS hazard identification and risk control processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates with others to achieve individual and team outcomes • Interacts to develop relationships with operational personnel and consultative groups

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Skill	Description
	• Seeks information from others to understand work and work relationships as they relate to hazard management
Get the work done	• Applies processes to plan, sequence and prioritise tasks, showing awareness of time and resource constraints and the needs of others • Uses decision-making processes in hazard identification and risk control processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Applies problem-solving processes, identifying and evaluating several options for action

Unit Mapping Information

Supersedes and is equivalent to BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control.

Links

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

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Assessment Requirements for BSBWHS414 Contribute to WHS risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to contribute to:

- identifying at least two different (WHS) hazards and controlling the risks associated with those hazards
- evaluating the effectiveness of the above risk controls.

During each of the above occasions, the candidate must:

- identify and interpret information and data about WHS requirements and apply them to the selection and application of techniques, tools and processes for hazard identification, risk assessment and risk control
- contribute to documenting processes
- communicate with required people about WHS requirements and compliance
- comply with WHS requirements for hazard identification, risk assessment, and risk control activities
- identify WHS duty holders and their duties.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data relating to the performance evidence, and procedures for accessing them
- WHS hazard identification, risk assessment and risk control processes specified in:
  - required WHS laws
  - organisational WHS policies, procedures, processes, and systems
- risk management requirements, including:
  - identifying duty holders and their roles and responsibilities

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    - selecting and using hazard identification tools and techniques
    - undertaking, documenting and communicating risk assessments
    - evaluating risk controls
    - documenting and communicating risk control plan
- differences between hazards and risks in the workplace
- range of common workplace hazards, and the nature, severity and likelihood of those hazards
- risk assessment and controls that can eliminate or minimise risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment, technology, software and consumables required to access information on WHS laws
- WHS laws, and organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS415 Contribute to implementing WHS management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to implementing a plan for a work health and safety management system (WHSMS) that applies to own role.

The unit applies to individuals with responsibilities for contributing to the implementation of an organisation's WHSMS as part of their work health and safety (WHS) responsibilities in a range of industry and workplace contexts.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

3. For the purposes of this unit of competency 'safe systems of work' refers to a formal procedure that results from systematic examination of a task in order to identify all the hazards. It defines safe methods to ensure that hazards are eliminated or, where this is not possible, risks are minimised.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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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 Contribute to developing WHSMS implementation plan	1.1 Apply knowledge of WHS laws and organisational policies and procedures to identify duty holders relevant to own role 1.2 Contribute to identifying elements of WHSMS plan to be implemented relevant to own role 1.3 Record plan according to organisational policies and procedures 1.4 Communicate plan to others, and integrate their feedback as required
2 Contribute to implementing developed plan	2.1 Implement plan for WHSMS within scope of own role 2.2 Communicate plan to others in relation to their roles and responsibilities as specified in plan, and clarify as required 2.3 Facilitate contribution of others to implement plan
3 Contribute to reviewing WHSMS implementation plan	3.1 Contribute to monitoring safe systems of work according to organisational policies and procedures and within scope of own role 3.2 Contribute to evaluating effectiveness of implemented elements of WHSMS plan and implementation process 3.3 Contribute to adjusting implementation plan as required according to organisational policies and procedures 3.4 Document and distribute adjusted plan to required personnel according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Locates, reviews and interprets WHS laws and organisational texts

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Skill	Description
Writing	• Uses structure, layout and language suitable for audience to document WHSMS implementation plan • Develops required documentation using appropriate organisational formats and industry-specific vocabulary
Numeracy	• Collects, organises and analyses information about systems of work and draws conclusions in relation to effectiveness of WHSMS plan
Oral communication	• Presents information and advice about WHSMS using language, structure and register appropriate to audience • Asks questions and listens closely to gather required information
Navigate the world of work	• Takes responsibility for own adherence to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS and WHSMS • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• Identifies what, with whom and how to communicate in the context of WHS policy and performance, and WHSMS processes • Cooperates with others as part of WHS and WHSMS processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates with others to achieve individual and team outcomes
Get the work done	• Applies formal processes to plan, sequence and prioritise tasks and workload, showing awareness of time, resource constraints and needs of others • Uses digital systems and programs to assist with planning, implementing and tracking progress, and communicating • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Applies formal problem-solving processes, identifying and evaluating several options for action

Unit Mapping Information

Supersedes and is equivalent to BSBWHS405 Contribute to implementing and maintaining WHS management systems.

Links

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Assessment Requirements for BSBWHS415 Contribute to implementing WHS management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to contribute to:

- planning the implementation of a work health and safety management system (WHSMS) that incorporates return-to-work and injury management procedures, and other key relevant WHSMS elements
- implementing the WHSMS plan and reviewing its effectiveness.

During the above, the candidate must:

- communicate and explain the WHSMS plan and associated WHS policy to others to facilitate their contribution to implementing the system.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- elements of organisation's WHSMS and associated plan with reference to required commonwealth and state/territory WHS laws and standards, including:
  - required policies and procedures, including those concerning return-to-work and injury management
  - duty holders and their responsibility
  - safe systems of work
  - consultation and communication arrangements
  - required training and induction
  - WHS risk assessment
- organisational WHS policies, procedures, processes and systems relevant to implementing WHSMS in own work role

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- tools, methods and processes for implementing and reviewing WHSMS plan, including consultation with required personnel
- regulatory authority WHSMS tools, standards, guidance material and procedures required to contribute to implementing WHS management systems.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and organisational WHS policies and procedures required to demonstrate the performance evidence
- workplace equipment, technology, software and consumables required to access information about WHS laws
- WHS laws, and organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBWHS416 Contribute to workplace incident response

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to assist with actions and activities performed in response to workplace incidents according to work health and safety (WHS) legislative and organisational requirements.

The unit applies to those who contribute to workplace incident responses by undertaking a varied range of activities in a structured and familiar work environment as defined in written procedures. It applies to people who work in a broad range of WHS roles across all industries.

NOTES

1. The terms ‘incident’ and ‘accident’ are equivalent. Specific state/territory legislation may use one or the other. In jurisdictions where *model WHS laws* have not been implemented, RTOs are advised to contextualise this unit of competency by referring to the existing state/territory OHS legislative requirements and industry-specific legislative variances.

2. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to assist with actions and activities associated with incident response	1.1 Identify duty holders and WHS legislative requirements for incident response 1.2 Identify workplace policies, procedures and processes concerning incident response planning and reporting 1.3 Communicate requirements for responding to incident to required personnel within scope of own role and work area 1.4 Contribute to developing communication mechanisms to notify manager of incident
2. Assist with implementing response procedures during incident	2.1 Provide initial assistance to those involved in incident within scope of own role and expertise and according to organisational incident response policies and procedures 2.2 Assist with documenting incident according to workplace procedures and processes 2.3 Assist with meeting legislative requirements regarding incident, within scope of own role and expertise 2.4 Assist with reporting incident to external authorities, according to legislative requirements and workplace procedures and processes
3. Contribute to collecting WHS information about incident	3.1 Assist with obtaining information and data from those involved about actions and events leading up to, during and after an incident, using appropriate data collection techniques 3.2 Assist with identifying and accessing sources of additional information and data related to incident 3.3 Compile and enter information according to record-keeping requirements
4. Assist with incident investigation	4.1 Assist with applying required incident investigation processes 4.2 Use appropriate analysis techniques to interpret causes of incident and communicate with advisors

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ELEMENTS	PERFORMANCE CRITERIA
	when participating in workplace investigations 4.3 Review incident reports according to organisational policies and procedures 4.4 Contact responsible persons and relevant authorities as outlined in WHS laws, and organisational policies and procedures 4.5 Contribute to communicating investigation outcomes to relevant stakeholders according to organisational policies and procedures
5. Contribute to developing and implementing recommended measures and actions arising from incident investigation	5.1 Contribute to developing incident investigation recommendations 5.2 Assist with obtaining approval of developed recommendations from required stakeholders according to organisational policies and procedures 5.3 Assist with communicating approved recommendations to required stakeholders according to organisational policies and procedures 5.4 Contribute to implementing recommended measures and actions arising from incident investigation within scope of own role and according to WHS legislative requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Locates, reviews and interprets WHS legislative texts • Analyses reports and other material about incidents to determine required course of action
Writing	• Completes workplace records, forms and documentation using correct format, spelling and grammar, and industry-specific terminology • Records information for reference using language appropriate to audience
Oral Communication	• Presents information and advice using structure and language suitable for audience • Uses questioning and listening techniques to obtain feedback from

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Skill	Description
	others and confirm understanding
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and organisational policies and procedures • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• Identifies what, with whom and how to communicate in the context of incident responses and investigations • Collaborates with others to achieve individual and team outcomes • Cooperates with others as part of incident investigations and contributes to specific activities requiring joint responsibility and accountability
Get the work done	• Applies processes to plan, sequence and prioritise tasks required for incident responses and investigations, showing awareness of time, resource constraints and needs of others • Uses features and functions of digital tools to complete work tasks and access information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS406 Assist with responding to incidents.

Links

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

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Assessment Requirements for BSBWHS416 Contribute to workplace incident response

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to responding to at least two different workplace incidents according to work health and safety (WHS) legislative and organisational requirements.

During the above, the candidate must:

- identify duty holders relevant to incident response
- contribute to:
  - communicating WHS requirements clearly and accurately to individuals and/or parties involved
  - reporting each incident according to WHS legislative and organisational requirements
  - obtaining information about each incident using appropriate data-collection techniques
  - developing and contributing to implementing required actions in response to each incident
  - investigating incident
  - communicating and implementing recommendations from investigation.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws about investigating and reporting workplace incidents
- sources of internal and external WHS information and data relating to incidents, and procedures for accessing them
- organisational policies, procedures, processes and systems relevant to own role or work area that relate to incident response and investigation, including those for:

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  - recording information relating to workplace incident responses
  - reporting information to external authorities
  - implementing improvements to policies, procedures, processes and systems as a result of an incident
- communication strategies to facilitate engagement of individuals and/or parties in incident response
- roles and responsibilities of self and duty holders in responding to workplace incidents.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures, procedures and plans required to demonstrate the performance evidence
- WHS legislation, licensing requirements and standards required to demonstrate the performance evidence
- WHS data required to contribute to incident response
- case studies and, where possible, real situations
- workplace equipment and resources
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS417 Assist with managing WHS implications of return to work

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to assist with managing the WHS implications of activities that facilitate an injured worker's return to work. It involves identifying those with roles, duties, rights and responsibilities for return to-work, as well as assisting in preparing, implementing and evaluating the return to work.

The unit applies to those in an organisation who assist with the WHS implications of return-to-work activities. In many organisations, this role will be performed alongside others from within the organisation or external parties, including those working in human resources, workers' compensation, workplace rehabilitation, other professional and administrative capacities, and other roles relating to return to work.

NOTES

1. The unit does not in any way address the process of treating workers for their injury or illness, which is the task of health and medical professionals.

2. Workers' compensation legislation and associated duties will differ between jurisdictions. RTOs are advised to contextualise this unit of competency by referring to the requirements of existing state/territory workers' compensation legislation.

3. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

4. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

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Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify return-to-work requirements	1.1 Identify legislative requirements for facilitating injured worker's return to work 1.2 Identify individuals and parties with roles, duties, rights and responsibilities regarding injured worker's return to work 1.3 Identify relevant organisational policies and requirements for injured worker's return to work
2. Assist with preparing return to work for injured worker	2.1 Assist with identifying suitable return-to-work duties for injured worker in consultation with required internal and external stakeholders 2.2 Identify potential barriers for worker returning to work, in consultation with relevant parties 2.3 Assist with design of return-to-work program for injured worker based on advice from medical professionals and consultation with required parties, and within scope of own role 2.4 Assist with identifying potential WHS-related risks to other team members arising from injured worker's reduced capacity and absence, and how to manage these potential risks 2.5 Assist with establishing agreement between required parties on injured worker's return to work
3. Assist with implementing return to work	3.1 Assist with assessing intended work environment for injured worker for potential WHS-related risk 3.2 Consult with required stakeholders about WHS implications of return to work, and assist with incorporating feedback 3.3 Assist with providing guidance to required personnel about WHS implications of return-to-work process and support for necessary adjustments
4. Assist with monitoring and evaluating return to work	4.1 Facilitate regular feedback and communication between relevant parties 4.2 Assist with monitoring return to work and identifying hazards and areas of non-compliance according to organisational policies

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ELEMENTS	PERFORMANCE CRITERIA
	and procedures 4.3 Assist with taking action to address WHS hazards and areas of non-compliance, and modifying return to work as required according to WHS laws, and organisational WHS policies and procedures 4.4 Assist with evaluating return to work and implementing WHS-related recommendations for required improvements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Reviews and analyses WHS legislative requirements and organisational texts about return to work
Writing	• Produces information, reports and records using structure, language and layout appropriate to audience and organisational requirements
Oral communication	• Seeks and provides information about injured worker and return to work using language and features suitable for audience and context
Numeracy	• Performs calculations necessary to provide estimates related to timeframes
Navigate the world of work	• Adheres to WHS legal and regulatory responsibilities, and organisational policies and procedures in relation to own role and responsibilities • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• Identifies what, with whom and how to communicate in the context of own role and responsibilities • Cooperates with others as part of processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates and negotiates with others to achieve joint/agreeable outcomes in sensitive situations • Communicates effectively with a range of medical and other professionals in relation to role and responsibilities
Get the work done	• Plans tasks with logically sequenced steps, reflecting awareness of time and resource constraints and needs of others • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of

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Skill	Description
	criteria • Monitors progress of tasks in order to provide timely information to workers and modify plans as necessary

Unit Mapping Information

Supersedes and is equivalent to BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs.

Links

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

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Assessment Requirements for BSBWHS417 Assist with managing WHS implications of return to work

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to assist with:

- managing WHS implications of planning and implementing return to work for one injured worker, and within scope of own role:
  - develop return-to-work objectives for worker, in consultation with treating doctor and other medical professionals where required
  - identify any required job redesign and alternative duties
  - assess work environment for injured worker for potential hazards and associated risks
- monitoring and evaluating above return to work, including:
  - identifying and taking action to address WHS hazards and areas of non-compliance
  - identifying areas for improvement and making recommendations for system improvement as required.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to primary duties and risk management associated with the performance evidence, including:
  - WHS laws
  - laws relating to workers' compensation and claims management
- organisational policies and procedures for:
  - obtaining and verifying information from injured workers
  - facilitating injured workers' return to work
  - liaising with medical professionals involved in injured workers' return to work
  - assisting with designing return-to-work programs for injured workers
  - risk assessments of work environments

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    - monitoring return to work and responding to hazards and areas of non-compliance
- key features and components of organisation's return to work of injured workers, including:
    - roles and responsibilities of all parties involved in developing, implementing and monitoring return to work
    - typical content of return-to-work activities
    - approach to hazard identification and risk assessment regarding specific features of return to work
- potential WHS-related risks to team members arising from reduced capacity and absence of returning worker in relation to:
    - impact on workloads
    - required resources and adjustments to workspaces
    - new hazards, or potential harm from existing hazards
- roles and responsibilities of medical professionals in relation to return to work management
- methods, techniques and tools to support workers involved in return to work:
    - WHS implications of alternative duties
    - preparing a workplace for an injured worker's return to work.
    -

Assessment Conditions

Assessment must comply with WHS and workers' compensation laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace documentation and WHS data required to demonstrate the performance evidence
- legislation required to assist with managing WHS implications of return to work
- organisational policies and procedures required to demonstrate the performance evidence
- workplace equipment and resources
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS418 Assist with managing WHS compliance of contractors

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to assist with managing the work health and safety (WHS) implications of using contractors. It involves identifying contractor duties, establishing organisational WHS compliance requirements associated with those duties, establishing and communicating the requirements expected of contractors, monitoring contractor compliance with WHS requirements, and implementing required responses to identified non-compliance.

The unit applies to those who work in a broad range of WHS roles across all industries in organisations that use contractors to supply services, including labour hire and temporary workers, cleaning, catering, security, maintenance, repairs, installations and alterations, and major contracts and projects, as relevant to the organisation. This includes casual and volunteer workers. It does not cover visitors, or outworkers or suppliers of goods, materials or products to workplaces.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare for contractor WHS induction	1.1 Identify services to be supplied by contractor, their proposed work arrangements and places of work 1.2 Identify and review organisational documentation and WHS legislative requirements applicable to contractor 1.3 Identify and review, within scope of own role, contractor-specific WHS compliance requirements
2. Assist with contractor WHS induction process	2.1 Provide contractor with access to relevant WHS documentation 2.2 Assist with WHS induction briefing specific to contractor according to organisational WHS policies and procedures 2.3 Document completed contractor WHS induction process
3. Assist with monitoring contractor WHS compliance requirements	3.1 Review required documentation as it applies to assessing contractor WHS compliance against agreed key performance indicators 3.2 Participate in workplace inspections to assess contractor compliance with WHS requirements 3.3 Document contractor non-compliance relating to WHS practices, policies and procedures 3.4 Assist with investigating contractor non-compliance, and in making necessary adjustments to WHS contractor compliance requirements
4. Assist with addressing contractor WHS non-compliance	4.1 Assist with reporting identified contractor WHS non-compliance according to organisational policies and procedures 4.2 Consult with contractor and required personnel to assist with addressing areas of contractor WHS non-compliance 4.3 Escalate contractor WHS non-compliance that is outside own role according to organisational policies and procedures

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and analyses legal and organisational texts relevant to contractor WHS requirements
Writing	• Uses structure, layout and language suitable for audience when preparing documentation and other communications
Oral communication	• Uses suitable language when presenting information, offering opinions and providing advice about WHS contractor arrangements
Navigate the world of work	• Adheres to WHS legal and regulatory responsibilities, and organisational policies and procedures • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• Cooperates with others as part of contractor WHS arrangement processes, and contributes to specific activities requiring joint responsibility and accountability • Identifies what, with whom and how to communicate in the context of assisting with managing contractor WHS compliance
Get the work done	• Determines priorities and sequences the steps for clearly defined tasks, and identifies and assembles the resources required within scope of own role • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria

Unit Mapping Information

Supersedes but is not equivalent to BSBWHS408 Assist with the management of WHS contractors.

Links

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

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Assessment Requirements for BSBWHS418 Assist with managing WHS compliance of contractors

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- assist with managing the work health and safety (WHS) compliance of two contractors, each providing different services.

During the above, the candidate must assist with:

- identifying contractor WHS arrangements, including required:
  - organisational WHS policies, procedures and systems
  - WHS induction and guidance information
- reviewing contractor work processes, procedures and activities
- addressing within scope of own role and reporting contractor non-compliance with WHS requirements.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of information and data relevant to contractor WHS arrangements, and procedures for accessing them
- organisational WHS policies, procedures, processes and systems relevant to contractors
- contexts, situations and arrangements where contractor services are supplied to the organisation
- contractor WHS arrangements with reference to relevant commonwealth and state/territory WHS laws
- key WHS requirements about workplace, contracted work, and organisational policies and procedures to be covered in contractor induction

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- workplace documentation required for managing contractor WHS compliance with services involved in the performance evidence, including:
  - formal contracts and agreements to supply services or relevant parts thereof
  - supporting documents about contracts and agreements
  - organisational WHS policies and procedures
  - WHS laws
- duties, rights and obligations of individuals and parties as specified in relevant WHS laws with regard to supply of services by contractors.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, licensing requirements and standards required to demonstrate the performance evidence
- WHS information required to demonstrate the performance evidence
- WHS requirements and related information for identified contractor services, including:
  - formal contracts and agreements to supply services
  - supporting documents about contracts and agreements
  - information about any undocumented understandings and/or agreements
- workplace equipment and resources
- case studies or, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS419 Contribute to implementing WHS monitoring processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to monitoring a range of physical agents and conditions relating to work health and safety (WHS) in the workplace. It involves the use of a range of measuring devices to collect, interpret and report on workplace information and data in relation to those physical agents and conditions.

The unit applies to those working in a broad range of WHS roles across all industries.

The unit does not extend to hazard identification, risk assessment or developing risk controls based on the outcomes of monitoring, which are covered in BSBWHS414 *Contribute to WHS risk management*.

This unit does not qualify individuals to perform duties as a registered officer under any legislation.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

Licensing, legislative and certification requirements may apply to this unit in some jurisdictions. Users are advised to check with the relevant regulatory authority.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to selecting measuring devices	1.1 Contribute to determining WHS regulatory requirements and standards that apply to monitoring 1.2 Consult with relevant individuals and/or parties to identify agents and/or conditions to be measured, according to organisational policies and procedures 1.3 Identify characteristics of agents and/or conditions to be monitored 1.4 Identify work area where measurements are to be taken 1.5 Contribute to selecting measuring equipment according to agents and/or conditions, work environment, activities being carried out and level of risk to self and others present at time of monitoring 1.6 Determine limits of own expertise and available equipment, and seek specialist advice and equipment as required
2. Contribute to preparing to collect workplace information and data	2.1 Determine sampling process for data collection 2.2 Contribute to outlining a sampling plan according to organisational policies and procedures 2.3 Collect information and data about requirements, nature and purpose of monitoring 2.4 Inspect work area and consult with workers and affected individuals and/or parties about nature of agents and/or conditions to be monitored 2.5 Contribute to checking operability of equipment according to WHS laws, and organisational policies and procedures
3. Contribute to collecting workplace information and data	3.1 Assist with arranging calibration of monitoring equipment where required 3.2 Contribute to testing according to legislative requirements 3.3 Use equipment to conduct sampling according to legislative requirements 3.4 Ensure own health and safety and that of others present at the time of monitoring while collecting information and data 3.5 Record readings according to organisational requirements, using expert support and advice as required

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ELEMENTS	PERFORMANCE CRITERIA
4. Contribute to cleaning and storing equipment	4.1 Participate in reinstating equipment and parts to pre-use condition, or dispose of appropriately 4.2 Contribute to correctly storing reusable equipment, and/or making it ready for re-use as required, according to WHS laws, and organisational policies and procedures
5. Contribute to documenting and evaluating results of monitoring	5.1 Assist with interpreting and evaluating results against a recognised standard and document results 5.2 Use results to contribute to preparing reports on the monitoring process, including any WHS regulatory requirements 5.3 Ensure that results and records are retained in an easily retrievable format according to WHS laws, and organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and analyses legal, organisational and technical texts relevant to monitoring
Writing	• Uses appropriate structure, layout and language for reporting and recording information about WHS monitoring in a clear and logical manner
Oral communication	• Uses structure and language suitable for audience to present or seek information about monitoring
Numeracy	• Uses units of measurement required for specific hazards • Uses appropriate scales when using equipment • Performs calculations to interpret sampling results
Navigate the world	• Adheres to legal and regulatory responsibilities in relation to own

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Skill	Description
of work	WHS role and responsibilities • Keeps up to date on changes to WHS laws relevant to own role
Interact with others	• Identifies what, with whom and how to communicate in the context of WHS monitoring • Cooperates with others as part of WHS monitoring 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	• Determines priorities, sequences the steps for clearly defined tasks, and identifies and assembles resources required to plan for WHS monitoring within scope of own role • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Uses familiar digital systems and tools to access, organise, analyse and display information relevant to role • Manages and maintains files securely in appropriate storage media and formats to enable retrieval according to legislative requirements

Unit Mapping Information

Supersedes and is equivalent to BSBWHS409 Assist with workplace monitoring processes.

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Links

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Assessment Requirements for BSBWHS419 Contribute to implementing WHS monitoring processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to monitoring at least three different physical agents or conditions relating to work health and safety (WHS) typically found in the workplace.

During each of these occasions, the candidate must:

- identify regulatory requirements and standards that apply to monitoring physical agents and/or conditions relevant to WHS
- identify context of measurements to be undertaken, including:
  - physical agents and/or conditions to be measured and their characteristics
  - where measurements will be taken
  - area or space available
  - movements of people and equipment, tasks or activities being undertaken, number of persons occupying area, and other factors that may impact on the sampling or data-collection processes and the health and safety of self and others
  - physical features of equipment, such as emitting sources
- prepare and collect WHS data and information
- consult and communicate with individuals and parties regarding monitoring process
- seek expert advice, support and equipment as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data
- typical physical agents and/or conditions relevant to WHS, including:

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  - biological agents, such as insects, mites and bacteria
  - electricity
  - fibres, dusts and particulates
  - fumes, mists, gases and vapours
  - heat and humidity
  - light
  - noise
  - radiation, including ionising, non-ionising and laser
  - vibration
- aspects of WHS laws and standards relevant to using testing equipment and measuring physical agents and/or conditions and how they apply to the organisation
- mode of action of common physical agents and/or conditions on the body and how they produce discomfort and harm
- characteristics, modes of action and units of measurement for major physical agents and/or conditions
- environmental conditions that impact on measurements
- types of measuring and monitoring equipment and techniques for correct and safe use, including limitations on use and output, adjustment, maintenance and any in-built alarms
- personal communication strategies to facilitate engagement with workplace parties and individuals
- organisational policies and procedures for:
  - identifying physical agent and/or condition to be measured
  - determining sampling process and defining a plan
  - checking operability of equipment to ensure it meets organisational and work activity requirements
  - maintaining own health and safety and that of others present during process described in the performance evidence
  - reinstating equipment to pre-use condition, including for dismantling and cleaning equipment and parts
  - storing and re-using equipment
  - retaining results and records.
  -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- measuring devices and equipment
- workplace equipment and resources
- WHS laws, licensing requirements and standards required to demonstrate the performance evidence

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- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to develop processes and procedures for controlling hazardous chemicals in the workplace, and then monitoring their effectiveness. The unit requires the application of knowledge associated with work health and safety (WHS) legislation, and organisational policies and procedures relating to controlling hazardous chemicals.

The unit applies to those who work under supervision and use some discretion and judgement to respond to monitoring hazardous chemicals in the workplace. It applies to hazardous chemicals with the potential to harm human health, which may be solids, liquids or gases – pure substances or mixtures. When used in the workplace these substances often generate vapours, fumes, dusts and/or mists.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

3. For the purposes of this unit of competency ‘safe systems of work’ refers to a formal procedure that results from systematic examination of a task in order to identify all the hazards. It defines safe methods to ensure that hazards are eliminated or, where this is not possible, risks are minimised.

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

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Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to develop processes and procedures to control hazardous chemicals in the workplace	1.1 Identify and source current WHS laws, and organisational policies and procedures relating to controlling hazardous chemicals 1.2 Identify hazardous chemicals used in, or created by, workplace 1.3 Identify workplace tasks involving hazardous chemicals 1.4 Use safety data sheets (SDSs) and other guidance to determine potential worker exposure to identified hazardous chemicals 1.5 Seek specialist advice during preparation phase, as required
2. Develop processes and procedures to control hazardous chemicals in the workplace	2.1 Assess risks associated with identified hazardous chemicals 2.2 Use information from workplace environmental monitoring to determine compliance with exposure standards, environmental requirements, storage specifications or associated risk management strategies 2.3 Develop safe systems of work that include suitable risk control measures, and processes and procedures for those systems 2.4 Seek and integrate feedback from required personnel about developed processes and procedures 2.5 Communicate and promote developed processes and procedures to required personnel
3. Monitor effectiveness of processes and procedures developed to control hazardous chemicals in the workplace	3.1 Review workplace implementation of control processes and procedures 3.2 Identify non-compliance with control processes and procedures 3.3 Implement training and development procedures and

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ELEMENTS	PERFORMANCE CRITERIA
	protocols to address areas of identified non-compliance
4. Report on effectiveness of processes and procedures in controlling hazardous chemicals in the workplace	4.1 Provide feedback on outcomes of workplace monitoring to required personnel 4.2 Record outcomes of monitoring process and distribute to required personnel according to workplace policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Locates, interprets and analyses WHS legislative and workplace information about hazardous chemicals
Writing	• Uses appropriate organisational formats and industry-specific vocabulary to document control processes and procedures
Oral communication	• Uses structure and language suitable for audience to communicate information and contribute ideas about hazardous chemical control
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to hazardous chemicals • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role
Interact with others	• Cooperates with others and contributes to specific activities requiring joint responsibility and accountability
Get the work	• Uses decision-making and problem-solving processes in

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Skill	Description
done	hazardous chemicals monitoring: sets and clarifies goals, gathers information and checks compliance • Uses processes to monitor outcomes of processes and procedures to control hazardous chemicals in the workplace

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two different occasions, develop processes and procedures to control hazardous chemicals in the workplace.

During each of these occasions, the candidate must:

- identify hazardous chemicals in the workplace through inspections and consultation with required personnel
- monitor and report on implementation of control processes and procedures
- communicate requirements and compliance associated with hazardous chemicals in the workplace
- comply with work health and safety (WHS) requirements for hazardous chemical monitoring
- implement training and development opportunities to address non-compliance
- identify WHS duty holders and their duties, and seek specialist advice as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- range of common workplace hazardous chemicals and the origin and nature of associated harm
- requirements for controlling hazardous chemicals as specified in:
  - relevant WHS laws, licences and permit conditions
  - organisational WHS policies, procedures, processes and systems

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    - documentation about the safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals in the workplace, including safety data sheets (SDSs)
- risk control processes and procedures, including:
    - identifying hazards and assessing risks
    - responding to incidents involving hazardous chemicals
- organisational policies and procedures for:
    - accessing internal and external sources of WHS information and data
    - recording outcomes of monitoring process and distributing to required personnel according to workplace policies and procedures
- key features and components of controls for hazardous chemicals in the workplace, including:
    - workplace register for hazardous chemicals
    - labelling of hazardous chemicals
    - workplace signposting
    - current and complete SDSs for hazardous chemicals in the workplace
    - risk controls in line with the hierarchy of control measures
    - safe work practices that eliminate, or where this is not possible, minimise risks
- emerging issues about hazardous chemicals and identifying potential risks from exposure to hazardous chemicals
- hierarchy of control measures suited to identified hazardous chemicals
- training and development procedures and protocols.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, standards and guidelines required to demonstrate the performance evidence
- organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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BSBWHS512 Contribute to managing work-related psychological health and safety

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to managing work-related psychological health and safety. It requires the ability to identify psychosocial hazards, assess their risk, and implement control methods for psychosocial hazards that apply in the workplace.

The unit applies to those with work health and safety (WHS) supervisory responsibilities who work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia (SWA) for further information.

3. Safe Work Australia national guidance material refers to ‘psychosocial hazards or factors’ as ‘anything in the design or management of work that increases the risk of work-related stress’ and states that ‘work-related stress if prolonged and/or severe can cause both psychological and physical injury’. (SWA, *Work-related psychological health and safety: A systematic approach to meeting your duties*)

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish requirements for managing work-related psychological health and safety	1.1 Review and analyse legislative requirements applicable to psychological health and safety 1.2 Determine workplace responsibilities relating to psychological health and safety 1.3 Determine roles and responsibilities of stakeholders in relation to managing psychological health and safety
2. Record work-related psychosocial hazards in the workplace	2.1 Identify work-related psychosocial hazards in own workplace, and factors contributing to them 2.2 Access and store information, data and advice to assist with identifying work-related psychosocial hazards according to legislative requirements 2.3 Consult with workers and other required stakeholders to confirm identified work-related psychosocial hazards 2.4 Develop and maintain a register of identified work-related psychosocial hazards according to legislative requirements
3. Assess risk of identified work-related psychosocial hazards	3.1 Identify and consult with individuals and/or parties who should participate in risk assessment of identified work-related psychosocial hazards 3.2 Assess frequency and duration of exposure to identified work-related psychosocial hazards, and determine severity of risk 3.3 Record psychosocial risk assessment according to organisational policies and procedures
4. Contribute to implementing risk controls for risks associated with identified work-related psychosocial hazards	4.1 Contribute to determining required risk controls for identified work-related psychosocial hazards according to the hierarchy of control measures 4.2 Contribute to selecting risk controls that address identified work-related psychosocial hazards and control risks 4.3 Communicate selected risk controls to required stakeholders according to organisational policies and

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ELEMENTS	PERFORMANCE CRITERIA
	procedures
5. Review effectiveness of risk controls for managing work-related psychological health and safety	5.1 Establish strategy and timeframe for reviewing risk controls for identified work-related psychosocial hazards 5.2 Consult with individuals and/or parties to review risk controls 5.3 Evaluate effectiveness of risk controls and document areas for improvement

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and critically analyses texts when contributing to work-related psychological health and safety • Constructs meaning from texts to assist in promoting work-related psychological health and safety
Writing	• Develops risk registers, reports and associated documentation according to organisational requirements • Uses vocabulary, grammatical structure and conventions appropriate to text when developing risk registers, reports and other documentation
Oral communication	• Asks questions and actively listens to gather information about potential risk situations • Provides information during or after work-related psychological health and safety response situations using structure and language appropriate to the audience
Navigate the world of work	• Contributes to broader goals in work-related psychological health and safety contexts • Identifies own legal rights and responsibilities, and general legal principles in relation to work-related psychological health and safety contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in work-related psychological health and safety contexts
Interact with others	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction

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Skill	Description
	• Supports, consults and liaises with others in work-related psychological health and safety situations
Get the work done	• Formulates plans and monitors actions against stated goals, adjusting plans and resources to cope with contingencies • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate actions and responses • Applies problem-solving processes when identifying actions required for work-related psychological health and safety • Documents outcomes and feedback from others in order to identify general principles and concepts that may be applicable in new situations • Identifies the potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBWHS512 Contribute to managing work-related psychological health and safety

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to managing at least two different work-related psychological health and safety issues.

During the above, the candidate must:

- identify legislative requirements and workplace responsibilities
- collect, document and analyse relevant information and data to assist with identifying work-related psychosocial hazards according to organisational policies and procedures, including those relating to privacy and confidentiality
- identify potential work-related psychosocial hazards, with input from others, and document them in a risk register
- record at least two psychosocial risk assessments
- determine options for addressing identified work-related psychosocial hazards or minimising the risk
- evaluate effectiveness of existing risk controls and document areas for their improvement, identifying when a review of risk controls is needed.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to work-related psychological health and safety:
  - duty of care
  - due diligence
  - privacy and confidentiality

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- organisational policies, procedures, processes and systems relating to work-related psychological health and safety:
  - collecting, documenting and analysing information and data relevant to work-related psychosocial hazards
  - communicating control methods for work-related psychosocial hazards
  - personal protective equipment (PPE) requirements
  - reporting procedures
  - recordkeeping procedures and prescribed period for keeping records
  - privacy and confidentiality
- techniques and procedures for identifying common work-related psychosocial hazards and factors contributing to them:
  - level of job demands, job control, support, workplace relationships, role clarity, recognition and reward, organisational change management, organisational justice, and environmental conditions
  - remote work and isolated work
  - violent and traumatic events, including secondary and vicarious trauma
- internal and external sources of WHS information and data, and procedures for accessing them
- key personnel who contribute to managing work-related psychological health and safety
- common work-related psychological health and safety controls
- elements of a WHS management system that relate to work-related psychological health and safety
- methods of collecting valid and reliable work-related psychological health and safety information
- roles and responsibilities of WHS personnel
- WHS information needs of individuals and/or parties.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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BSBWHS513 Lead WHS risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to lead the management of work health and safety (WHS) risks in an organisation. The unit includes facilitating the identification of hazards and potential hazards, leading the assessment of associated risks, selecting and implementing suitable risk controls, and evaluating the overall effectiveness of the organisational WHS risk management process. It involves communicating with stakeholders throughout the process.

The unit applies to those in an organisation who provide specialised knowledge and guidance to a range of personnel when leading the management of WHS risks.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Facilitate identification of WHS risk management requirements	1.1 Identify and review internal and external sources of WHS information and data that apply to risk management processes 1.2 Identify legislative requirements for WHS risk management 1.3 Identify duty holders, individuals and/or parties to consult about and participate in risk management processes, according to organisational and legislative requirements 1.4 Identify and communicate roles and responsibilities of individuals and/or parties that impact on risk management 1.5 Identify organisation-specific factors that will impact on hazard identification, risk assessment and risk controls 1.6 Confirm that risk management scope is clearly defined according to organisational policies and procedures
2. Lead risk assessment	2.1 Lead hazard identification process according to organisational policies and procedures 2.2 Identify and document risk factors as they apply to identified hazards according to organisational policies and procedures 2.3 Apply knowledge of WHS laws, workplace WHS information and data, and identified hazards and risk factors to analyse and assess risk 2.4 Document risk assessment according to organisational policies and procedures, and legislative requirements 2.5 Communicate outcomes of risk assessment to required personnel according to organisational and legislative requirements
3. Lead risk control	3.1 Identify organisational risk control policies and procedures appropriate to identified hazards 3.2 Select suitable risk controls according to assessed level of risk, organisational WHS hazard and risk control policies and procedures, and WHS laws 3.3 Plan to implement selected risk controls according to organisation’s WHS management system (WHSMS) and WHS information system (WHSIS) 3.4 Implement selected risk controls according to organisational policies and procedures

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ELEMENTS	PERFORMANCE CRITERIA
	3.5 Document and communicate selected risk controls to required personnel, according to organisational and legislative requirements
4. Evaluate effectiveness of WHS risk management process	4.1 Establish nature and scope of evaluation process and key performance indicators 4.2 Review effectiveness of implemented risk management process according to organisation's WHSMS and legislative requirements 4.3 Modify risk management process as required in response to evaluation 4.4 Document risk management process according to WHSIS requirements 4.5 Communicate evaluation findings according to organisational requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Organises, analyses and integrates information from a range of sources
Writing	• Documents results of investigations using clear and comprehensible language and layout
Oral Communication	• Uses listening and questioning techniques to clarify understanding of others' views • Presents information with varying level of technical vocabulary to suit audience
Numeracy	• Collates, interprets and compares mathematical and statistical information relevant to requirements
Navigate	• Considers legal and regulatory

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Skill	Description
the world of work	responsibilities when implementing, monitoring or reviewing risk-management processes • Leads effective consultation and participation during all stages of WHS risk-management process
Interact with others	• 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 outcomes
Get the work done	• Develops plans or processes to manage WHS risk management tasks, with an awareness of how they contribute to operational and strategic goals • Determines 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 WHS 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

Supersedes and is equivalent to BSBWHS503 Contribute to the systematic management of WHS risk.

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Assessment Requirements for BSBWHS513 Lead WHS risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- plan, implement and evaluate a systematic process for managing work health and safety (WHS) risk in a work area.

During the above, the candidate must:

- identify, interpret and apply information from a range of sources, including organisational and legislative requirements
- review WHS risk-management process according to established scope and key performance indicators
- consult effectively with required stakeholders using appropriate interpersonal communication skills.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws relating to WHS risk management, including WHS Acts, regulations, codes of practice and standards
- WHS information and data that applies to WHS risk-management process, including:
  - organisational and duty holder legal requirements
  - organisational policies and procedures relating to identifying hazards, assessing risks and implementing risk controls
  - key components of the work health and safety management system (WHSMS)
- internal and external sources of WHS information and data, and procedures for accessing them

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- organisational behaviour and culture in relation to WHS risk management activities and their impact on WHS and the work team, including organisation's risk appetite
- key components of effective consultation and participation strategies
- tools and techniques to:
  - identify health and safety hazards
  - assess risks, taking into account nature and impact of risk, and likelihood of risk arising
  - identify and select suitable risk controls
  - facilitate effective communication and consultation processes, and identify key personnel related to communication
- application and limitations of techniques and tools for identifying hazards, and analysing and assessing risks
- hierarchy of control measures:
  - its use in establishing level of risk
  - factors limiting effectiveness of types of controls
  - role and limitations of procedural controls
  - use of personal protective equipment
- other functional areas in the organisation that impact on the management of WHS-related risks
- impact of workforce characteristics and composition on WHS risk and its management, including:
  - cultural background/diversity
  - gender
  - labour market changes
  - levels of language, literacy and numeracy skills in the workforce
  - workforce structure and organisation, including part-time, casual and contract workers, shift rosters and geographical location
  - workers with specific support needs and limitations
  - workplace cultural attitudes towards alcohol and other drug use
- principles of decision-making.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

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Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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BSBWHS514 Manage WHS compliance of contractors

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to lead and coordinate organisational arrangements for managing the work health and safety (WHS) compliance of contractors. It involves determining the WHS legislative and organisational requirements applicable to contractors, and managing compliance of contractors.

The unit applies to those in managerial positions overseeing functions within organisations across all industries that are supplied with services by contractors, including labour hire and temporary workers, cleaning, catering, security, maintenance, repairs, installations and alterations, and major contracts and projects, as relevant to the organisation. This includes casual and volunteer workers. It does not cover visitors, or outworkers or suppliers of goods, materials or products to workplaces.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish and communicate WHS requirements in relation to contractors	1.1 Analyse scope of contractor services and applicable WHS legislative and organisational requirements 1.2 Determine organisation-specific WHS requirements and guidance that relate to contractor services 1.3 Establish WHS key performance indicators (KPIs) relating to contracted services according to organisational policies and procedures 1.4 Document established WHS requirements according to organisational policies and procedures 1.5 Communicate WHS requirements to contractor according to organisational policies and procedures
2. Monitor contractor compliance with established WHS requirements	2.1 Review services being provided by contractor for compliance with WHS requirements and established KPIs 2.2 Identify and investigate contractor non-compliance with WHS requirements and WHS KPIs 2.3 Discuss and agree with contractor required response in relation to identified non-compliance according to organisational policies and procedures 2.4 Document agreed response to non-compliance according to organisational policies and procedures
3. Review WHS requirements in relation to contractors	3.1 Make necessary adjustments to organisation-specific WHS requirements and guidance that relate to contractor services 3.2 Seek feedback on revised WHS requirements and guidance 3.3 Distribute updated contractor WHS requirements to required personnel according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

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Skill	Description
Reading	• Interprets and analyses legal and organisational texts relevant to contractor WHS arrangements
Writing	• Uses structure, layout and language suitable for a range of audiences when preparing WHS KPIs, and WHS guidance and induction documentation
Oral communication	• Uses language suitable for audience to present information, offer opinions and discuss WHS contractor arrangements
Navigate the world of work	• Adheres to WHS legal and regulatory responsibilities, and organisational policies and procedures • Keeps up to date on changes to WHS laws, and organisational policies and procedures relevant to own role and responsibilities
Interact with others	• Cooperates with others as part of contractor WHS arrangement processes • Identifies what, with whom and how to communicate when managing WHS arrangements for contractors
Get the work done	• Determines priorities, and sequences the steps, in clearly defined tasks • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBWHS514 Manage WHS compliance of contractors

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage the work health and safety (WHS) compliance of at least two different contractors, each providing different services.

During the above, the candidate must:

- establish WHS requirements specific to the contracted services
- review and address contractor compliance
- review and improve organisational approach to leading WHS arrangements for contractors.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- duties, rights and obligations of:
  - contractors as specified in relevant WHS laws, and organisational WHS policies and procedures about supplying services
  - managers in relation to contractor WHS arrangements, including those relating to required resources and equipment
- internal and external sources of information and data relevant to contractor WHS arrangements, and procedures for accessing them
- contractor WHS compliance requirements included in:
  - tender documentation, including requirements for subcontracting
  - contractor selection processes and guidelines
  - contract documentation, including nature, scope and location of services to be provided, and requirements for subcontracting

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  - induction processes
- procedures and protocols for establishing WHS-related lead and lag key performance indicators (KPIs), and measuring contractor performance against them
- organisational WHS policies, procedures, processes and systems relating to contractor services and WHS requirements, including those for:
  - establishing and documenting WHS KPIs relating to contracted services
  - communicating WHS requirements to contractors
  - agreeing on and documenting required response in relation to non-compliance
  - distributing contractor WHS requirements to required personnel.
  -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and data required to demonstrate the performance evidence
- workplace equipment and resources
- case studies or, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS515 Lead initial response to and investigate WHS incidents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to lead the initial response to work health and safety (WHS) incidents. The unit also includes planning, conducting and reporting on investigations of WHS incidents that have resulted in, or have the potential to result in, injury or damage. This may include accessing specialist expertise.

The unit applies to those who work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts. It does not apply to those undertaking an investigation in order to provide legal advice or prepare for legal proceedings.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Lead the initial response to incident	1.1 Identify required initial response to incident according to established organisational response plan 1.2 Implement initial response according to plan, and organisational and legislative requirements 1.3 Confirm sufficiency and suitability of implemented initial response 1.4 Consult individuals and/or parties according to organisational policies and procedures
2. Develop and resource an incident investigation plan	2.1 Identify duty holders according to WHS laws and workplace policies, procedures and systems 2.2 Define scope and purpose of investigation appropriate to nature and scope of incident 2.3 Identify, document and secure required human and other resources appropriate to nature and scope of incident, including expert advice as required 2.4 Ensure participation of, and consultation with, required stakeholders, and determine agreed processes for investigation 2.5 Identify, address and document potential barriers to investigation according to organisational requirements 2.6 Document incident investigation plan according to organisational and WHS legislative requirements
3. Collect incident information and data	3.1 Identify and access relevant and reliable sources of incident information and data according to organisational policies and protocols, suitable causation model and legislative requirements 3.2 Inspect incident site, equipment and other evidence according to investigation plan, organisational procedures and legislative requirements 3.3 Present collected information and data in required format
4. Lead an incident investigation that is not part of providing legal advice or preparing for legal	4.1 Brief investigation team on investigation requirements and incident causation model 4.2 Construct and document timeline of events leading up

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ELEMENTS	PERFORMANCE CRITERIA
proceedings	to incident 4.3 Coordinate investigation of key events, conditions and/or circumstances that contributed to incident 4.4 Develop recommendations, interventions and practical measures for investigation report
5. Record and report WHS incident investigation	5.1 Document investigation evidence and basis for conclusions and recommendations 5.2 Prepare investigation report according to organisational procedures and WHS legislative requirements 5.3 Implement organisational and WHS legislative recordkeeping protocols and procedures in relation to investigation report 5.4 Communicate report to required individuals and/or parties according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Reviews and interprets WHS legislative texts relating to WHS incidents • Analyses reports and other material to determine required course of action
Writing	• Documents procedures, plans and outcomes using appropriate organisational formats and industry-specific terminology • Develops reports using structure, format and language appropriate for report purpose and audience
Oral communi	• Uses appropriate language and non-verbal features to provide support, give instructions or

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Skill	Description
cation	request information • Listens closely to extract main ideas and to evaluate initial responses for accuracy and validity
Numeracy	• Extracts and evaluates the numerate and graphical information embedded in sources of incident information and data • Performs calculations in relation to resource requirements, timelines and evaluation measures, and the impact and implications of incidents
Navigate the world of work	• Develops, implements or modifies workplace procedures applicable to investigation contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work
Interact with others	• Identifies and uses appropriate conventions and protocols when communicating with parties involved in various investigation stages • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Takes a leadership role in developing team understanding of investigation requirements

Get the work done	• Uses logical planning processes and understanding of context to:
	  • identify relevant information and risks
	  • identify and evaluate alternative strategies and resources for investigation processes
	• Sequences and schedules complex activities, monitors implementation and manages relevant

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Skill	Description
	communication • Uses analytical processes to review plans and seeks input and advice from others before taking necessary action • Uses digital systems and tools for data collection and analysis, and communication and reporting

Unit Mapping Information

Supersedes and is equivalent to BSBWHS505 Investigate WHS incidents.

Links

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

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Assessment Requirements for BSBWHS515 Lead initial response to and investigate WHS incidents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- lead the initial response to one work health and safety (WHS) incident that complies with legislative and organisational requirements
- prepare, record and communicate incident investigation report that addresses immediate and underlying causes of incident and recommends practical prevention measures, according to organisational and WHS legislative requirements.

During the above, the candidate must:

- systematically develop and document a plan to investigate the incident
- collect, use and document information and data relevant to incident investigation
- establish key events, conditions and/or circumstances that contributed to the incident
- identify actions required to respond to the incident, including any recommendations for changes to WHS arrangements.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws applicable to WHS incidents and their investigation
- organisational WHS policies, procedures, processes, systems, roles and responsibilities relating to responding to and investigating WHS incidents:
  - incident response plan that meets legislative and organisational requirements
  - protocols and procedures for investigation, including preserving incident site as required
  - protocols for maintaining objectivity, confidentiality, privacy and commercial requirements during investigation of WHS incident

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    - information and data collection procedures that ensure their validity, admissibility and accuracy
    - due diligence and duty of care requirements when investigating WHS incidents
    - required format for reporting incident investigations
- common industry-accepted causation models, and their use in informing data collection and analysis
- internal and external sources of WHS information and data relevant to WHS incident investigations
- key components of incident investigation plan, including:
    - duty holders, expert advisers and key stakeholders appropriate to incident
    - agreed timelines, objectives, responsibilities, roles, documentation, actions and outcomes
    - levels of accountability
    - protocols for ensuring privacy and sensitivity throughout investigation
- key components of investigation report, including:
    - identified incident root causes
    - recommended actions, interventions and practical measures arising from investigation
    - plans for implementing and evaluating recommendations
- techniques and tools for gathering information relating to incident investigation, including:
    - questioning and active listening
    - information collection
    - accurate note taking
- types and characteristics of WHS incidents and suitable incident response processes.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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Links

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to the development, implementation and maintenance of elements of a work health and safety management system (WHSMS). WHSMSs support organisations in systematically managing work health and safety (WHS) in the workplace. WHSMSs consist of a documented set of plans, actions and procedures that target improvements.

The unit applies to those with organisational responsibilities for contributing to tasks in relation to elements of a WHSMS appropriate to the nature and scale of the organisation and its WHS risks. These people will have supervisory responsibilities, work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to developing WHSMS	1.1 Access and analyse sources of information to determine required form, content, purposes and functions of WHSMS 1.2 Identify duty holders and their roles and responsibilities in WHSMS, according to WHS laws 1.3 Document organisational WHSMS that meets legal and organisational requirements 1.4 Consult with individuals and parties about what the WHSMS should include and integrate their feedback as required 1.5 Communicate information about WHSMS to required personnel
2. Contribute to developing WHSMS implementation plan	2.1 Identify key components of plan that meet legal and organisational requirements 2.2 Facilitate and support consultation with, and participation of, required personnel in plan development 2.3 Contribute to developing draft plan according to organisational policies and procedures 2.4 Seek feedback on draft plan 2.5 Finalise and record plan according to organisational policies and procedures
3. Support implementation of WHSMS	3.1 Consult with colleagues on WHSMS implementation and agree on required timeframe and resources 3.2 Communicate benefits of WHSMS and agree on management roles and responsibilities in supporting its implementation 3.3 Identify and address potential barriers to WHSMS implementation according to organisational policies and procedures
4. Contribute to measuring and evaluating WHSMS performance	4.1 Communicate requirements for measuring and evaluating WHSMS performance to required personnel according to organisational requirements 4.2 Facilitate and support consultation with, and participation of, required personnel in measuring and

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ELEMENTS	PERFORMANCE CRITERIA
	evaluating WHSMS performance 4.3 Evaluate WHSMS performance outcomes according to established protocols 4.4 Analyse and document outcomes of evaluation process
5. Contribute to review of WHSMS	5.1 Gather and analyse required review documentation according to organisational policies and procedures 5.2 Facilitate and support consultation with, and participation of, required personnel to identify opportunities to improve WHSMS 5.3 Contribute to identifying required changes to WHSMS 5.4 Contribute to adjusting WHSMS as required according to organisational policies and procedures 5.5 Seek approval of updated WHSMS from required personnel 5.6 Distribute information about approved updated WHSMS according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and critically analyses texts in relation to WHSMS information and WHSMS review documentation
Writing	• Matches style of writing to purpose and audience in consulting, developing and communicating WHSMS and WHS policy • Uses appropriate layout, vocabulary, grammatical structure and conventions in consulting, developing and communicating WHSMS and WHS policy
Oral communication	• Presents information about WHSMS and WHS policy using structure and language appropriate to the audience • Uses questions and active listening to extract main ideas, gather information and feedback, and seek and offer opinions
Numeracy	• Selects from and applies an expanding range of mathematical and problem-solving strategies in relation to WHSMS measurement and evaluation

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Skill	Description
Navigate the world of work	• Accepts responsibility for developing, implementing or modifying workplace policies and procedures applicable to WHSMS • Keeps up to date on changes to WHS laws and regulations relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work
Interact with others	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction
Get the work done	• Sequences and schedules activities, monitors implementation and manages relevant communication in relation to WHSMS planning • Uses systematic and analytical processes in non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria in review and evaluation of WHSMS • Uses digital systems and tools in the context of plan implementation and measurement, and evaluation of WHS performance

Unit Mapping Information

Supersedes and is equivalent to BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to developing, implementing, reviewing and improving a work health and safety management system (WHSMS) for an organisation.

During the above, the candidate must:

- communicate and explain the WHSMS and associated implementation plan to others to facilitate their contribution and ensure their commitment to the system
- apply effective consultation and communications processes and protocols
- use suitable and sufficient tools to measure and evaluate WHSMS performance.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws, guidance material and publications relating to developing and implementing WHSMS
- organisational requirements for WHSMS:
  - commitment from line management and supervisors to provide leadership in WHS and prioritise WHS as part of operational planning and activity
  - compliance with required policies, procedures, processes, and tools
  - requirements for recordkeeping that address WHS, privacy and other relevant legislation
- elements of effective WHSMS with reference to required commonwealth and state/territory WHS Acts, regulations, codes of practice and standards, including:
  - policies and procedures

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  - WHSMS certification standards
  - duty holders and their responsibilities
  - consultation and communication arrangements
  - required training and induction
  - WHS risk assessment, including risk controls
  - sources of information to determine required form, content, purposes and functions of WHSMS to be developed and implemented
- key components of WHSMS plan:
  - required resources to implement plan within set timeframes
  - management roles and responsibilities in supporting WHSMS implementation and operation
  - roles and responsibilities of individuals and parties under WHS laws
  - procedures, protocols and tools for measuring WHS performance, including WHS-related lead and lag key performance indicators (KPIs)
- barriers to implementing WHSMS, and strategies to address them
- benefits to an organisation of having a WHSMS, and an integrated return-to-work and injury management program
- instruments issued by WHS regulators and how they apply to the organisation
- duties, rights and obligations of individuals and parties under WHS laws.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS517 Contribute to managing a WHS information system

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to contribute to managing a work health and safety information system (WHSIS) that supports the effective management of WHS. It involves accessing, collecting and analysing WHS information and data; evaluating the effectiveness of the WHSIS and contributing to improving the management of WHS; and communicating the change.

The unit applies to those who contribute to managing a WHSIS. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts. Individuals will apply skills and knowledge to enable them to manage information and data management processes, including analysis of the data. They are not required to design the actual information system or process.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Facilitate collection of workplace information and data	1.1 Access sources of WHS information and data according to organisational policies and procedures 1.2 Collect and record WHS information and data according to WHS laws, and organisational policies and procedures 1.3 Meet legislative requirements for reporting to external bodies within required timeframes 1.4 Record and store collected WHS information and data according to WHS laws, and organisational policies and procedures
2. Contribute to operating the WHSIS	2.1 Provide advice and support to users to enable them to use the WHSIS, and meet their WHS responsibilities and objectives 2.2 Identify training and development needs of WHSIS users, and take action as required to facilitate the required training within scope of own role
3. Contribute to reviewing WHSIS effectiveness	3.1 Determine required frequency, method and scope of WHSIS review in consultation with users 3.2 Facilitate user participation and consultation during WHSIS monitoring, evaluation and improvement activities 3.3 Review and analyse accuracy, currency and relevance of WHS information and data in consultation with users 3.4 Apply knowledge of WHSIS requirements to assist with identifying WHSIS elements needing improvement
4. Contribute to improving WHS management	4.1 Make recommendations for system improvements based on analysis of WHS information and data 4.2 Assist with developing measures to improve WHSIS and seek required approval 4.3 Communicate changes to WHSIS according to WHS laws, and organisational policies, procedures and systems 4.4 Assist with implementing improvement measures

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and critically analyses texts relating to WHSIS and applies appropriate strategies to construct meaning
Writing	• Matches style of writing to purpose and audience • Uses appropriate layout, vocabulary and grammatical structure for reporting on WHSIS performance or improvements
Oral communication	• Presents information about WHSIS and WHS policy using structure and language appropriate to the audience • Uses questions and active listening to extract main ideas and clarify understanding
Numeracy	• Uses mathematical and statistical information to extract reports and monitor effectiveness of WHS management • Uses appropriate visual/graphical displays to present WHS performance information
Navigate the world of work	• Meets reporting requirements according to organisational policies and procedures • Keeps up to date on changes to legislation or regulations relevant to own role and responsibilities, and considers their implications in relation to WHSIS
Interact with others	• Collaborates with others to gather valid and reliable data, playing an active role in facilitating effective group interaction • Provides feedback to others in forms they can engage with and respond to
Get the work done	• Plans, organises and implements tasks required to operate the WHSIS, using a range of technology and software systems • Extracts and analyses information and collates related reports • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices against a limited set of criteria in identifying training needs of system users • Applies problem-solving processes to identify WHSIS improvements, resolving complex issues in manageable parts, and identifying and evaluating available options for action • Seeks feedback and advice before implementing a solution • Uses digital systems and tools, and operates them effectively to complete WHSIS-related tasks, such as developing graphs and charts

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Unit Mapping Information

No equivalent unit.

Supersedes and is equivalent to BSBWHS507 Contribute to managing WHS information systems.

Links

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

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Assessment Requirements for BSBWHS517 Contribute to managing a WHS information system

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- collect, analyse, record and store a set of work health and safety (WHS) information and data
- provide advice and support on operation of a WHS information system (WHSIS) to at least three different system users, and action their identified training needs within scope of own role
- use the WHSIS to generate at least one report to an external body within required timeframes
- contribute to identifying and implementing an improvement measure for a WHSIS based on analysis of information and data, and communicate measures to required personnel according to WHS legislative and organisational requirements.

During the above, the candidate must:

- follow WHS legislative requirements and organisational policies and procedures
- consult with, advise and support system users.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS information and data relevant to organisation and its needs (which is a function of the size and nature of the organisation), and to specific hazards in the workplace
- commonwealth and state/territory WHS legislative requirements relating to:
  - roles and responsibilities of individuals and parties in relation to WHSIS
  - consultation
  - collecting, recording and storing WHS information and data

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- privacy and confidentiality
- legislative and organisational requirements of a WHSIS:
  - duty holders and roles
  - WHS information for effective WHS management
  - functions and purposes
  - user needs
  - workplace-specific factors
  - internal and external sources of WHS information and data
- nature of information and data that provides valid and reliable measures of performance of WHS management processes and their limitations
- organisational WHS policies, procedures, processes and systems, including:
  - accessing, collecting, analysing and recording WHS information and data
  - storing, retrieving and retaining WHS information and data
  - external reporting requirements
- security, privacy and confidentiality requirements relating to accessing, collecting and storing WHS information and data
- requirements for reporting under WHS and other relevant legislation, including obligations for notification and reporting of incidents
- methods for providing evidence of compliance with WHS laws
- tools and techniques for:
  - collecting accurate, current and relevant WHS information and data
  - reviewing effectiveness of WHSIS
- systems for accessing, storing and retrieving WHS information and data
- communication strategies for facilitating engagement of system users
- user training arrangements.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports and sample software for WHS information and data collation and analysis
- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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Links

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

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BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to effectively manage work health and safety (WHS) hazards and to comply with WHS laws, as they apply to the management or control of items of plant being maintained and used in a workplace. It requires strong communication skills and systematic approaches to identify and resolve WHS issues associated with plant.

The unit applies to those who provide guidance to others in the workplace in managing WHS hazards associated with plant. The unit does not apply to the design, manufacture, supply, installation, construction or commissioning of plant or issuing of licences associated with plant.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify WHS hazards associated with plant	1.1 Access sources of WHS information, data and advice relating to items of workplace plant 1.2 Inspect items of plant and identify how they are to be used, according to organisational policies and procedures 1.3 Determine WHS hazards arising from plant use, condition, suitability, location and potential abnormal situations 1.4 Consult with others to confirm hazard identification 1.5 Record and report identified hazards according to organisational policies and procedures
2. Assess WHS risks associated with plant	2.1 Access sources of information, data and advice to assist with assessing WHS risks associated with identified plant hazards 2.2 Consult with others to inform WHS risk assessment according to organisational policies and procedures 2.3 Record and report on WHS risk assessment according to WHS laws and organisational policies and procedures
3. Control WHS risks associated with maintenance and use of plant	3.1 Access sources of information, data and advice to inform development of risk controls for safe maintenance and use of plant 3.2 Develop risk controls to be implemented according to the hierarchy of control measures, WHS legislative requirements and organisational policies and procedures 3.3 Consult with, and report to, required internal and specialist personnel in relation to risk controls to be implemented 3.4 Communicate rights, obligations and duties of workplace personnel in relation to identified hazards and risk controls associated with plant 3.5 Monitor effectiveness of implemented risk controls 3.6 Record and report on implemented risk controls according to WHS legislative requirements and organisational policies and procedures
4. Advise on registration,	4.1 Identify types of plant requiring registration and tasks

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ELEMENTS	PERFORMANCE CRITERIA
licensing and certification issues associated with plant	requiring operator licensing and/or certification according to WHS legislative requirements 4.2 Document registration, licensing and certification requirements according to organisational procedures 4.3 Monitor and report compliance with WHS regulatory requirements for registration, licensing and certification according to organisational procedures 4.4 Communicate registration, licensing and certification requirements to required personnel
5. Manage training requirements for plant maintenance and operation	5.1 Identify WHS-related training needs associated with plant items, and applicable registration, licensing and certification requirements 5.2 Identify skill gaps of those maintaining and using plant, and determine and communicate their associated training needs 5.3 Ensure training is undertaken and completed prior to commencing work with new plant and/or new system of work 5.4 Maintain training records according to WHS requirements and organisational policies and procedures

Foundation Skills

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

Skill	Description
Reading	• Analyses a wide range of WHS-related technical and non-technical information and data to determine actions, and adheres to requirements associated with plant maintenance and use
Writing	• Uses appropriate formats, vocabulary and grammatical structures to record, report and present information associated with plant
Oral	• Explains information clearly and

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Skill	Description
Communication	involves others in collaborative discussions using listening and questioning techniques
Numeracy	• Collates, interprets and compares mathematical and statistical information
Navigate the world of work	• Follows WHS policies, procedures and legislative requirements, and identifies organisational implications of new WHS laws • Modifies or develops systems of work to comply with legislative and organisational requirements
Interact with others	• Establishes and uses appropriate conventions and protocols when communicating with others regarding management of WHS hazards associated with plant
Get the work done	• Develops and applies organisational processes to aid compliance with WHS legislative requirements • Sequences and schedules own activities, monitors implementation, records progress and manages relevant communication • Systematically gathers and analyses information and evaluates options in order to make informed decisions • Evaluates effectiveness of systems and processes to inform decisions on how to implement risk control improvements • Fully utilises features of digital tools to complete tasks

Unit Mapping Information

No equivalent unit.

Supersedes and is equivalent to BSBWHS508 Manage WHS hazards associated with plant.

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Links

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

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Assessment Requirements for BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement work health and safety (WHS) related risk controls for at least two different items of plant according to the hierarchy of control measures, WHS legislative requirements and organisational policies and procedures
- identify and manage licensing and training requirements associated with at least two different items of plant.

During the above, the candidate must:

- manage effective identification of hazards
- communicate, according to established protocols, to:
  - advise relevant personnel of their rights, obligations, and duties in relation to hazards and risk controls associated with plant
  - seek specialist advice as required.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- key features of WHS Acts, regulations, codes of practice and other instruments issued by WHS regulators relating to managing WHS hazards associated with plant, including role and duty of persons conducting a business or undertaking (PCBUs)
- organisational WHS policies, procedures, processes and systems relating to hazard management process, including:
  - identifying and accessing internal and external sources of WHS information and data
  - inspecting plant and its use
  - consulting with internal and external personnel

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    - recording and reporting identified WHS hazards
    - recording and reporting risk assessment outcomes and risk controls
    - developing risk controls and monitoring the effectiveness of their implementation
    - documenting registration, licensing and certification requirements
    - monitoring and reporting compliance with regulatory requirements for registration, licensing and certification
- basic principles of incident causation and injury processes relating to plant
- differences between a hazard and a risk
- factors that impact on risk
- hierarchy of control measures and its use in choosing between different risk controls
- strategies for identifying risk controls and monitoring their effectiveness, including:
    - workplace inspections
    - robotic and technological processes, and their potential risks and limitations
    - review of adequacy of plant operating procedures
- high-risk work licences required for specific plant
- methods for providing evidence of compliance with WHS laws
- plant-specific knowledge:
    - basic physics of fluids under pressure and pressure vessels, and behaviour of pressurised fluid when pressure is released
    - hazards associated with plant
    - systems of work associated with plant
    - industry practices related to permit to work, and isolation and tag-out systems
    - registration requirements of plant, licensing and certification competencies
- risk controls relating to operation of plant, including:
    - strategies for guarding moving parts in machinery
    - access and egress
    - dangerous parts
    - emergency stops and warning devices
- WHS-related training requirements for plant operators relating to:
    - items of new plant
    - new or changed systems of work associated with plant.
    -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- sources of information, data and advice in relation to plant hazards

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- workplace equipment and resources, including manufacturer manuals, specifications, and operational information and data
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS519 Lead the development and use of WHS risk management tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to lead the development and use of work health and safety (WHS) risk management tools.

The unit applies to those responsible for managing hazards in the workplace whose role requires them to provide leadership in WHS risk management.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

3. WHS risk management tools are used in the four steps identified by the Safe Work Australia model code of practice, *How to manage work health and safety risks* – identify hazards, assess risks, control risks and review control measures.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	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 tools	1.1 Apply knowledge of risk management tools to address requirements of WHS laws and workplace 1.2 Consult with required personnel about selecting suitable risk management tools 1.3 Modify existing risk management tools and/or develop new ones to meet identified requirements 1.4 Determine risk management tools to be used in workplace
2. Lead the use of WHS risk management tools	2.1 Consult and liaise with required personnel about logistical arrangements required in relation to risk management tools 2.2 Facilitate required logistical arrangements for use of risk management tools in collaboration with required personnel 2.3 Develop and conduct required training for personnel who will use risk management tools 2.4 Use risk management tools according to organisational policies and procedures 2.5 Provide support to required personnel to use risk management tools according to organisational requirements
3. Communicate outcomes of use of WHS risk management tools	3.1 Collect information about outcomes of risk management tool use 3.2 Collate and analyse collected information 3.3 Document analysis according to organisational policies and procedures 3.4 Communicate documented results, findings and outcomes to required personnel according to organisational protocols and procedures
4. Review use of WHS risk management tools	4.1 Review usefulness and usability of risk management tools according to organisational requirements 4.2 Modify or replace risk management tools based on review outcomes according to organisational requirements 4.3 Modify consultation, liaison and logistical arrangements in relation to tools based on review outcomes according to organisational requirements

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and critically analyses texts to identify suitable WHS risk management tools
Writing	• Develops and modifies WHS risk management tools and associated logistical arrangements • Communicates using layout, vocabulary, grammatical structure and conventions appropriate to tool and audience
Oral communication	• Presents information about WHS risk management tools, using structure and language appropriate to audience • Asks questions and actively listens to extract main ideas across a range of contexts as appropriate to WHS risk management tools
Navigate the world of work	• Identifies operational context in which WHS risk management tools are used and kept up to date
Interact with others	• Engages with others to support them in their use of WHS risk management tools
Get the work done	• Sequences and schedules activities, monitors implementation and manages relevant communication • Uses analytical processes to decide on a course of action, establishes criteria for deciding between WHS risk management tools, and seeks input and advice from others before taking necessary action • Uses technology and digital systems and tools effectively

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Unit Mapping Information

Supersedes and is equivalent to BSBWHS509 Facilitate the development and use of risk management tools.

Links

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

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Assessment Requirements for BSBWHS519 Lead the development and use of WHS risk management tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- in consultation with others, select at least one work health and safety (WHS) risk management tool to be developed or modified that addresses WHS legislative and organisational requirements
- use above WHS risk management tool/s for intended purpose, including:
  - facilitating logistical arrangements to the point of completion
  - collating and analysing results and findings
  - communicating results, findings and outcomes
- facilitate the use of the above WHS risk management tool/s, including:
  - developing and conducting training for users
  - consulting about and facilitating logistical arrangements for use
  - supporting users
- review usefulness and usability of above WHS risk management tool/s and make changes based on review outcomes.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws and other instruments issued by WHS regulators relating to the performance evidence, and procedures for applying them
- factors to consider when selecting WHS risk management tools, including:
  - operational contexts, including specific physical and psychosocial hazards
  - WHS organisational information, and valid and reliable methods for collecting it
  - tool application and use
  - limitations

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  - models for incident causation
  - usefulness and usability
- organisational policies and procedures relating to WHS risk management tools, including those for:
  - modifying and developing tools
  - communicating information
  - providing support on tools and their use
  - reviewing tools
- key features of good-practice WHS risk management tools
- techniques, tools and processes for identifying WHS hazards:
  - hazard and risk checklists
  - hazard hunts
  - job safety analyses
  - manifests and registers, including those for dangerous goods, hazardous chemicals and plant
  - surveys using questionnaires, interviews and other techniques
  - safe work method statements
  - workplace inspections and walk-throughs
- key aspects of logistical arrangements, including:
  - communications
  - availability of personnel
  - ensuring required work areas and processes are accessible and in operation
  - resources required to implement tool
  - timetabling
  - transport requirements.
  -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- sources of information, data and advice in relation to WHS risk management tools
- WHS risk management tools
- workplace equipment and resources, including manufacturer manuals, specifications, and operational information and data
- engagement in an actual workplace
- opportunities for interaction with others.

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Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBWHS520 Manage implementation of emergency procedures

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to implement initial response procedures for emergencies. Its focus is on the implementation of procedures already developed for short-term emergency responses. It assumes that expert advice will be available in identifying potential emergencies and in formulating response plans.

The unit applies to those with supervisory responsibilities for managing work health and safety (WHS) in the workplace who contribute to the implementation of procedures for responding to emergencies. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify potential emergencies	1.1 Apply knowledge of WHS hazards and relevant standards to identify possible causes of potential emergencies 1.2 Seek input from stakeholders in identifying potential emergencies 1.3 Identify and liaise with appropriate specialist advisers and emergency services and/or specialist response teams to identify possible causes of potential emergencies 1.4 Develop a risk register to identify potential emergencies and their possible causes
2. Identify options for initial response	2.1 Categorise major types of potential emergencies 2.2 Identify actions required to contain or limit potential emergencies 2.3 Identify actions required to limit impact of potential emergencies on personnel, property and the environment 2.4 Identify requirements for liaison with emergency services and/or specialist response teams 2.5 Prioritise initial response actions to be taken during emergencies
3. Plan initial response procedures	3.1 Identify resources available and required for initial response 3.2 Ensure that emergency equipment is checked for serviceability, accessibility, cleanliness and correct location 3.3 Document actions required for a range of major types of emergency, taking account of standards, current industry practice, specialist advice and input by emergency services and/or specialist response teams 3.4 Identify training needs and appropriate providers
4. Implement initial response procedures	4.1 Document and display actions for initial response 4.2 Outline own role in initial response 4.3 Follow required procedures according to WHS laws, and organisational policies and procedures
5. Review initial response procedures	5.1 Monitor initial response for effectiveness, efficiency and timeliness in consultation with stakeholders and, specialist advisers and agencies as required 5.2 Document results of response monitoring and promptly report to appropriate persons

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ELEMENTS	PERFORMANCE CRITERIA
	5.3 Identify areas for organisational and personal improvement and make recommendations based on analysis of response
6. Manage post-emergency activities	6.1 Identify and support other personnel involved in second response phase 6.2 Facilitate debriefing processes

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and critically analyses texts when planning emergency response procedures • Applies appropriate strategies to construct meaning from texts to assist in planning emergency response procedures
Writing	• Develops risk registers, reports and associated documentation according to organisational requirements, using appropriate vocabulary, grammatical structure and conventions
Oral communication	• Asks questions and actively listens to gather information about potential emergency situations • Provides information during or after emergency response situations using structure and language appropriate to audience and context
Navigate the world of work	• Contributes to broader goals in emergency response contexts • Identifies legal rights and responsibilities of self and others in relation to emergency response contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in emergency response contexts
Interact with others	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Takes a leadership role in supporting, consulting and liaising in emergency response contexts
Get the work done	• Formulates plans and monitors actions against stated goals, adjusting plans and resources to cope with contingencies • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate actions and responses • Applies problem-solving processes when identifying actions required

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Skill	Description
	in emergencies and associated training needs, resolving issues in manageable parts, and identifying and evaluating options for action • Reflects on response outcomes and feedback from others in order to identify general principles and concepts that may be applicable in new emergency situations • Identifies the potential of new approaches to enhance work practices and outcomes

Unit Mapping Information

Supersedes and is equivalent to BSBWHS510 Contribute to implementing emergency procedures.

Links

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

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Assessment Requirements for BSBWHS520 Manage implementation of emergency procedures

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage the planning, implementation and review of initial response procedures for at least two different emergencies.

During the above, the candidate must:

- identify and prioritise causes and options for initial response to contain or limit potential emergencies and their impact
- liaise with specialist advisers, emergency services and/or specialist response teams as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory work health and safety (WHS) legislation and how it applies to managing the implementation of initial response procedures
- organisational and workplace WHS policies and procedures relating to initial response, including:
  - identifying and reporting emergencies
  - categorising major types of potential emergencies
  - essential communication and actions in an emergency
  - reporting on response to emergency
- internal and external sources of WHS information and data, and procedures for accessing them
- organisational structure, roles and responsibilities of WHS personnel managing the implementation of initial response procedures

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- workplace emergency response equipment, including:
  - emergency alerting systems
  - emergency protection systems
  - smoke alarms, fire alarms and fire extinguishers
  - required safety wear
  - security systems
- nature of work, work site and hazards that may result in an emergency situation
- hazards arising and precautions to be taken during emergency response
- information needs of emergency response personnel during reporting, arrival and response to an emergency
- principles and priorities of fire protection and emergency response applicable to performance evidence
- accepted industry practice when responding to workplace emergencies.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS521 Ensure a safe workplace for a work area

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to establish, maintain and evaluate an organisation's work health and safety (WHS) policies, procedures and programs in a work area to ensure a safe workplace, according to WHS legislative requirements. It takes a systems approach and addresses compliance with relevant legislative requirements.

The unit applies to those working in a range of contexts who have, or are likely to have, responsibility for WHS as part of their broader management role. It is relevant for people with obligations under WHS laws, for example persons conducting a business or undertaking (PCBUs) or officers, as defined by WHS laws.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish a WHS management system in a work area	1.1 Locate, adapt, adopt and communicate WHS policies that define the organisation's commitment to complying with WHS laws 1.2 Identify duty holders and define WHS responsibilities for all workplace personnel in the work area according to WHS laws, policies, procedures and programs 1.3 Identify and approve financial and human resources required by the WHS management system (WHSMS) according to organisational procedures
2. Establish and maintain effective and compliant consultative arrangements for managing WHS in a work area	2.1 Work with required personnel to set up and maintain consultative arrangements according to required WHS laws 2.2 Resolve issues raised through participation and consultation arrangements according to required WHS laws and organisational protocols 2.3 Provide information about consultation and participation outcomes to required personnel according to organisational policies and procedures
3. Establish and maintain procedures for effectively identifying hazards, and assessing and controlling risks in 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 workplace change to ensure that new hazards are not created by 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 measures and WHS legislative requirements 3.4 Identify inadequacies in existing risk controls according to the hierarchy of control measures and WHS legislative requirements, and promptly provide resources to enable implementation of new measures 3.5 Identify requirements for expert WHS advice, and request this advice as required, according to organisational procedures
4. Evaluate and maintain a work area WHS management system	4.1 Develop and provide a WHS induction and training program for required personnel in a work area as part of

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ELEMENTS	PERFORMANCE CRITERIA
(WHSMS)	organisation's training program 4.2 Use a system for WHS recordkeeping to allow identification of patterns of occupational injury and disease in the organisation, and to maintain a record of WHS decisions made, including reasons for decisions 4.3 Measure and evaluate the WHSMS according to organisation's quality systems framework 4.4 Develop and implement improvements to WHSMS to achieve organisational WHS objectives according to organisational procedures 4.5 Ensure compliance with WHS legislative framework to achieve, as a minimum, WHS legal requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Organises, evaluates and critiques ideas and information from WHS laws, policies, procedures and programs
Writing	• Produces WHS policies, procedures and programs using appropriate vocabulary, grammatical structure and conventions • Records WHS decisions according to organisational requirements
Oral communication	• Presents and seeks information from others using structure and language suitable for the audience • Provides information about WHS policies and procedures and on resolution of WHS issues, varying the level of technical vocabulary to suit the audience
Numeracy	• Selects from, and applies, an expanding range of mathematical and problem-solving strategies in identifying financial and human resources required to support WHS requirements
Navigate the world of work	• Monitors adherence to legal and regulatory rights and responsibilities for self and others in relation to WHS • Develops, implements and reviews WHS-related policies, procedures and processes according to legislative and organisational requirements
Interact with others	• Plays a lead role in situations requiring effective collaboration, demonstrating the ability to guide discussions and negotiate

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Skill	Description
	agreeable outcomes • Provides feedback to others in forms they can understand and use
Get the work done	• 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 and 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

Unit Mapping Information

Supersedes and is equivalent to BSBWHS501 Ensure a safe workplace.

Links

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

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Assessment Requirements for BSBWHS521 Ensure a safe workplace for a work area

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- establish, implement, maintain and evaluate one work health and safety management system (WHSMS) for a work area of an organisation that complies with WHS laws, and organisational policies and procedures.

During the above, the candidate must:

- establish, implement, maintain and evaluate effective and compliant consultative arrangements for managing WHS, including:
  - identifying duty holders
  - identifying and approving required resources
  - developing and implementing a training program
- establish, implement, maintain and evaluate procedures for effectively identifying hazards, and assessing and controlling risks using the hierarchy of control measures.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- details of relevant WHS laws relating to ensuring a safe workplace
- WHS organisational policies, procedures, programs and practices required for the performance evidence
- hazard identification and risk-management processes
- key principles, uses and components of the hierarchy of control measures and procedures for applying it in the workplace
- organisational and WHS legislative reporting requirements.
-

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Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational WHS policies and procedures required to demonstrate the performance evidence
- WHS laws required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS522 Manage WHS consultation and participation processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to manage the identification, review, development, implementation and evaluation of consultation and participation processes as an integral part of managing work health and safety (WHS).

The unit applies to those responsible for facilitating consultation about and participation in WHS management and decision-making across the organisation. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify requirements for WHS consultation and participation	1.1 Review WHS laws 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 required personnel according to organisational procedures 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 required personnel 2.2 Identify inconsistencies between existing processes and identified requirements for WHS consultation and participation processes 2.3 Consult with required personnel 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 design of WHS consultation and participation processes 3.2 Design new or modify existing processes to achieve required improvements, in consultation with required personnel 3.3 Ensure improvements integrate with existing WHS and other systems and are appropriate to 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 required personnel
4. Facilitate implementation of WHS consultation and participation arrangements	4.1 Clarify individual roles and responsibilities in WHS consultation and participation arrangements 4.2 Provide advice and support to required personnel

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ELEMENTS	PERFORMANCE CRITERIA
	during implementation according to organisational procedures 4.3 Monitor and facilitate implementation, in consultation with required personnel 4.4 Recommend and facilitate changes to action plan as required according to organisational procedures
5. Monitor and evaluate WHS consultation and participation processes	5.1 Develop evaluation protocol, in consultation with required personnel 5.2 Develop and implement plan for collecting information 5.3 Analyse and evaluate information according to organisational policies and procedures 5.4 Make recommendations for improvement based on evaluation 5.5 Document action plan to address recommended improvements according to organisational policies and procedures 5.6 Communicate outcomes of monitoring and evaluation to required personnel according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Organises, analyses and critiques ideas and information from a range of legal and organisational texts to identify WHS duty holders, and consultation and participation requirements
Writing	• Employs broad vocabulary and uses grammatical structure and conventions appropriate to text in writing reports, plans and protocols • Uses appropriate vocabulary and language to seek information from others
Oral communication	• 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

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Skill	Description
Numeracy	• Uses required numeracy and problem-solving strategies and techniques in designing and using information collection and analysis processes
Navigate the world of work	• Adheres to legal and regulatory rights and responsibilities and monitors others' adherence in relation to WHS consultation and participation processes • Interprets operational policies and procedures to ensure that consultation and participation processes align with other work practices
Interact with others	• Plays a lead role in situations requiring effective collaboration • Provides feedback to others in forms they can understand and use
Get the work done	• Manages tasks with an awareness of how they contribute to operational and strategic goals • Uses systematic and analytical processes: sets goals, gathers relevant information, and identifies and evaluates options against agreed criteria • Considers whether, and how, others should be involved, using consultative or collaborative processes as an integral part of the decision-making process • Uses analytical processes to decide on a course of action, establishes criteria for deciding between options, and seeks input and advice from others before taking necessary action • Uses digital systems and tools for data collection and analysis and communication and reporting

Unit Mapping Information

Supersedes and is equivalent to BSBWHS502 Manage effective WHS consultation and participation processes.

Links

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

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Assessment Requirements for BSBWHS522 Manage WHS consultation and participation processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage effective work health and safety (WHS) consultation and participation processes in consultation with others for at least one WHS consultation and participation issue, including:
  - developing an action plan with positive performance indicators
  - identifying gaps and areas for improving processes
  - implementing, monitoring and reviewing processes.

During the above, the candidate must:

- implement legal and organisational requirements
- provide advice and support to others during implementation of process and recommend changes as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data, and procedures for accessing them
- communication networks, processes and formats required for consultation and participation processes
- commonwealth and state/territory WHS laws and guidance material, in particular the parts relating to:
  - duties of persons conducting a business or undertaking (PCBUs), officers, workers and inspectors
  - duty holders

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    - consultation, participation and representation
    - discriminatory, coercive and misleading conduct
    - workplace entry by WHS permit holders
- formal and informal communication and consultation processes, and key personnel related to communication
- impact of characteristics and composition of the workforce on WHS risk and WHS management, including:
    - communication skills
    - cultural background and diversity
    - gender
    - principles of coordination and cooperation
    - labour market changes
    - levels of language, literacy and numeracy skills in the workforce
    - structure and organisation of the workforce, including part-time, casual and contract workers, shift rosters and geographical location
    - workers with specific needs and limitations
- key roles and responsibilities of personnel, including agents of change in workplace management structure
- key features of organisational culture as it impacts on work team and consultation and participation processes
- relevant organisational WHS policies, procedures, processes and systems
- key features of the WHSMS and action plans as they apply to consultation and participation processes
- key design principles for planning and implementing consultation and participation processes
- key techniques for supporting and promoting consultation and participation processes
- key tools and techniques for evaluating plans and processes for consultation and participation.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports from other parties consulted about design, implementation, management and review processes
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

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Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to implement a system of work for managing the use, handling, processing, storage, transportation and disposal of hazardous chemicals in the workplace; and to verify and validate the effectiveness of that system and the control methods in place against safety data sheet (SDS) requirements. The unit includes the application of the hierarchy of control measures, and applicable legislative requirements and licensing conditions imposed on the workplace in managing these hazardous chemicals.

The unit applies to those accountable for ensuring that a system of work is in place for managing hazardous chemicals in a specified work area. The system of work to be implemented protects all those potentially at risk in the workplace from exposure to hazardous chemicals, including internal and external personnel.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to implement safe system of work to manage hazardous chemicals in work area	1.1 Identify hazardous chemicals in work area according to legislative requirements and workplace procedures 1.2 Check that hazardous chemicals register and SDSs contain required information about identified chemicals 1.3 Consult with required personnel to address any identified deficiencies and update hazardous chemicals register and safe work method statements (SWMSs) according to legislative requirements 1.4 Assess risks associated with identified hazardous chemicals and their use, handling, processing, storage, transportation and disposal
2. Implement and monitor system of work for managing hazardous chemicals in work area	2.1 Establish suitable control methods and incident action plans within work area, consulting with required personnel and seeking external specialist advice as required 2.2 Communicate established control methods and incident action plans to required personnel according to legislative requirements and workplace procedures 2.3 Monitor work area activities, processes and procedures for compliance with established control methods, and SDSs and SWMSs requirements according to workplace procedures 2.4 Adjust system components in response to identified deficiencies, within scope of own role, or escalate with suitable personnel, according to workplace procedures
3. Verify and validate system effectiveness in managing hazardous chemicals in work area	3.1 Monitor work area safety records and information against expected benchmarks according to workplace procedures 3.2 Seek feedback from suitable personnel to inform system verification and validation process 3.3 Document outcomes of, and recommendations arising from, system verification and validation process according to legislative requirements and workplace procedures 3.4 Report outcomes of system verification and validation process to required personnel

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and critically analyses texts when managing hazardous chemicals • Applies appropriate strategies to construct meaning from texts to assist in handling and storing hazardous chemicals
Writing	• Updates hazardous chemicals registers, SWMS, reports and associated documentation according to organisational requirements • Uses vocabulary, grammatical structure and conventions appropriate to text when developing documentation
Oral communication	• Asks questions and actively listens to gather information about potential risk situations • Provides information before, during and after hazardous chemicals situations using structure and language appropriate to the audience
Navigate the world of work	• Contributes to broader goals in hazardous chemicals exposure contexts • Identifies own legal rights and responsibilities as well as general legal principles in relation to hazardous chemicals • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in hazardous chemical contexts
Interact with others	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Takes a leadership role, as required, in supporting, consulting and liaising on hazardous chemicals incidents
Get the work done	• Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate storage and handling of hazardous chemicals

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- implement a system of work for managing hazardous chemicals in one work area
- verify and validate effectiveness of the implemented system of work.

During the above, the candidate must:

- interpret requirements in safety data sheets (SDSs) and safe work method statements (SWMSs) relating to the hazardous chemicals identified in work area
- select applicable higher-level controls.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- safe system of work for managing hazardous chemicals:
  - SDS and SWMS requirements relating to hazardous chemical use
  - SDS requirements relating to hazardous chemical storage, transport and disposal
  - control methods, including personal protective equipment (PPE) requirements
- workplace procedures for:
  - identifying hazards and assessing risk associated with hazardous chemicals
  - selecting suitable control methods and incident action plans
  - monitoring work area activities for compliance with selected controls and plans
- key principles of the hierarchy of control measures in eliminating or minimising exposure to hazards from chemicals
- standards, legislative requirements and licensing conditions applicable to work area for managing hazardous chemicals, including:

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  - Act/s pertaining to dangerous goods in the state or territory of operation, including transport and storage requirements
  - globally harmonised system of classification and labelling of chemicals (GHS): chemical classification and labelling requirements and protocols
- environmental effects of hazardous chemicals in work area and disposal considerations set out in applicable SDSs
- work area safety records and information to verify and validate effectiveness of system of work:
  - health records
  - first aid records
  - workplace exposure monitoring data.
  -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to develop, implement and evaluate strategies that support work-related psychological health and safety and the control of work-related psychosocial hazards.

The unit applies to those who are in a position to apply the principles of work-related psychological health and safety risk management to develop appropriate strategies in their organisation. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia (SWA) for further information.

3. Safe Work Australia national guidance material refers to ‘psychosocial hazards or factors’ as ‘anything in the design or management of work that increases the risk of work-related stress’ and states that ‘work-related stress if prolonged and/or severe can cause both psychological and physical injury’. (SWA, *Work-related psychological health and safety: A systematic approach to meeting your duties*)

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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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. Develop strategies that support work-related psychological health and safety	1.1 Access and assess information and data relevant to creating and sustaining a psychologically healthy and safe workplace 1.2 Review organisation's work-related psychosocial hazard register, associated risk assessments and identified risk controls 1.3 Review complaints and incidents relating to work-related psychological health and safety, and associated psychosocial hazards 1.4 Collaborate with others to develop strategies that maintain work-related psychological health and safety 1.5 Document strategies according to organisational policies and procedures
2. Implement developed strategies that support work-related psychological health and safety	2.1 Consult with required personnel to confirm their roles and responsibilities in relation to work-related psychological health and safety strategies 2.2 Communicate work-related psychological health and safety strategies to required personnel 2.3 Identify, disseminate and promote current information and data relating to implemented strategies 2.4 Identify situations where specialist support is required and access support as needed 2.5 Identify and address training needs for relevant stakeholders in identifying and managing risks to work-related psychological health and safety
3. Evaluate implemented strategies that support work-related psychological health and safety	3.1 Establish processes and procedures for evaluating effectiveness of implemented work-related psychological health and safety strategies 3.2 Seek feedback on implemented strategies from internal and, as required, external stakeholders 3.3 Apply established evaluation processes and procedures 3.4 Adjust strategy components in response to

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ELEMENT	PERFORMANCE CRITERIA
	evaluation outcomes and feedback received 3.5 Document and communicate evaluation outcomes to required personnel according to organisational policies and procedures 3.6 Document required enhancements to work-related psychological health and safety strategies arising from evaluation activities

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and analyses internal and external organisational texts relevant to work-related psychological health and safety requirements
Writing	• Communicates information about work-related psychological health and safety strategies, matching style of writing to purpose and audience • Drafts and develops required documents using appropriate vocabulary, grammatical structure and required conventions
Oral communication	• Presents information and ideas using vocabulary appropriate to audience and context • Uses questioning and active listening to facilitate discussion, seek clarification, confirm understanding and seek feedback • Communicates effectively, taking into consideration confidentiality and privacy of individuals
Numeracy	• Extracts and evaluates information and data from work-related psychological health and safety documents • Uses oral and written mathematical language and graphical representation to communicate
Navigate the world of work	• Identifies own and others' legal rights and responsibilities relating to work-related psychological health and safety
Interact with others	• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction
Get the work done	• Uses logical planning processes and understanding of context to plan work-related health and safety strategies

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Skill	Description
	• Sequences and schedules strategies, monitors their implementation and manages relevant communication • Uses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, and identifies and evaluates options against agreed criteria • Identifies and anticipates problems and promotes appropriate resources and information, as required

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement an organisational strategy to support work-related psychological health and safety
- evaluate effectiveness of the implemented strategy.

During the above, the candidate must:

- provide information to stakeholders about how to implement strategy and its associated procedures, using effective communication methods
- store records and information according to required privacy and confidentiality protocols.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws and other relevant publications and guidelines relating to information and data, consultation, participation and work-related psychological health and safety, including:
- Safe Work Australia national guidance material *Work-related psychological health and safety: A systematic approach to meeting your duties*
- workplace factors that support or detract from work-related psychological health and safety
- features of strategies that support work-related psychological health and safety, including:
  - organisational systems and protocols for managing risk and providing information to relevant stakeholders about how to report work-related psychological health and safety concerns

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  - organisational systems and protocols for reporting and communicating intervention strategies
  - procedures for reporting work-related psychological health and safety incidents and complaints
  - procedures for supporting individuals and/or parties impacted by work-related psychological health and safety, including referring to appropriate resources
  - methods for providing individuals with information and resources for managing own work-related psychological health and safety
  - communication and consultation processes that promote work-related psychological health and safety
  - resources required to support strategy implementation, including supportive technology
- organisational information, data and procedures that support implementation of work-related psychological health and safety strategies
- processes and procedures for evaluating effectiveness of implemented work-related psychological health and safety strategies
- internal and external sources of information and data about work-related psychosocial hazards and risks, and how to access them
- requirements for recordkeeping that use and store personal information according to privacy and confidentiality laws, and organisational policies, procedures, processes and systems
- work-related psychological health and safety duties of persons conducting a business or undertaking (PCBUs), officers and workers in relation to WHS risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational documentation, information and data
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to support the development of a strategy that embeds and promotes a just work health and safety (WHS) culture in a workplace. It includes facilitating workforce commitment to implementation and continuous improvement of the strategy, specifically from those in leadership positions. It also involves supporting organisational learning and development to strengthen the WHS culture in the workplace.

The unit applies to those responsible for directly supporting the development of workplace WHS culture.

NOTES

1. For the purposes of this unit of competency 'WHS culture' is defined as the shared values, attitudes, perceptions, competencies and patterns of behaviour that determine the commitment to, and the style and proficiency of, an organisation's health and safety management. Organisations with a just WHS culture are characterised by communications founded on mutual trust, by shared perceptions of the importance of safety, and by confidence in the efficacy of preventive measures.

2. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

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Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Assess current state of organisation's WHS culture	1.1 Analyse current good practice theories, programs and policies about organisational WHS culture 1.2 Assess current organisational WHS-related compliance with identified good practice according to organisational policies and procedures 1.3 Document assessment outcomes according to organisational policies and procedures 1.4 Communicate desired WHS culture to required personnel
2. Develop a strategy for creating a positive WHS culture	2.1 Identify current and future organisational priorities and objectives for WHS culture 2.2 Determine resourcing required to implement a leadership-driven WHS culture 2.3 Develop policies and procedures to support identified priorities and objectives in consultation with required personnel 2.4 Develop key performance indicators (KPIs) for measuring WHS culture according to organisational policies and procedures 2.5 Document strategy for creating a positive WHS culture and communicate it to required personnel
3. Implement developed strategy	3.1 Establish roles and responsibilities relating to strategy implementation 3.2 Consult with required personnel to confirm their roles and responsibilities in relation to leadership and strategy implementation 3.3 Lead implementation of strategy for creating a positive WHS culture 3.4 Disseminate information and data that promote WHS culture to required personnel, according to organisational policies and procedures

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ELEMENTS	PERFORMANCE CRITERIA
	3.5 Identify and address learning and development needs of workforce in adopting policies and procedures relating to WHS culture
4. Monitor and evaluate strategy that supports WHS culture	4.1 Establish processes and procedures for evaluating effectiveness of implemented strategy against established KPIs 4.2 Seek feedback on implemented strategy from internal stakeholders, and external stakeholders as required 4.3 Apply established evaluation processes and procedures 4.4 Document evaluation outcomes and communicate them to required personnel according to organisational policies and procedures 4.5 Adjust strategy components in response to evaluation outcomes and feedback received 4.6 Establish and implement future review mechanisms to ensure continuous improvement of WHS culture that reflects desired culture

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets detailed information and theories relating to workplace WHS culture • Interprets evaluation feedback
Writing	• Uses clear and precise language to develop policies, procedures, strategies and objectives • Develops strategy documentation in required format
Oral communication	• Discusses and seeks information using appropriate structure and language for the particular audience • Uses questioning and active listening to clarify or confirm understanding
Numeracy	• Interprets, analyses and presents data relating to strategy, including KPIs
Navigate the world of work	• Takes a lead role in the support and development of a WHS strategy

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Skill	Description
Interact with others	• Uses a variety of communication tools and techniques to promote objectives and awareness of a positive WHS culture • Uses inclusive and collaborative techniques to seek feedback and consults with a range of stakeholders • Works with leadership team to support their active involvement in strategy implementation
Get the work done	• Plans, organises and implements activities required to achieve strategic priorities and outcomes, including consulting with others and sequencing initiatives to ensure strategy awareness

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBWHS612 Develop and implement a strategy to support a positive WHS culture

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement a strategy that embeds a positive work health and safety (WHS) culture in an organisation
- evaluate implemented strategy.

During the above, the candidate must:

- identify theories and information relevant to developing this strategy
- report effectiveness of WHS culture to required personnel
- communicate effectively with leadership team and other required personnel
- review implemented strategy and identify opportunities for its continuous improvement.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to WHS culture, including privacy and confidentiality considerations of WHS records and information
- internal and external sources of information relating to theories, programs and policies about WHS culture
- organisational policies and procedures for:
  - assessing information about the current WHS culture in the organisation
  - developing key performance indicators relating to WHS culture
  - evaluating implementation of strategy and documenting outcomes of evaluation
  - using feedback tools and obtaining feedback
  - establishing and supporting workforce learning and development needs

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- key features of a positive WHS culture
- key features of good-practice strategies for creating a positive WHS culture
- communication and consultation processes relating to creating a positive WHS culture and strategy implementation
- workforce factors impacting on WHS culture, including:
  - workforce language, literacy and cultural profiles
  - organisational behaviour
  - leadership attitudes and behaviour
- roles and responsibilities of personnel involved in developing, implementing and promoting a strategy for WHS culture.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws relating to WHS culture
- organisational documentation, information and data relating to strategy developed for the performance evidence
- real situations and, where possible, case studies
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS613 Evaluate the WHS performance of an organisation

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to evaluate the effectiveness of an organisation's work health and safety (WHS) performance, including its hazard identification and WHS risk management arrangements, its processes for monitoring performance, and the outcomes of its WHS management arrangements. It also incorporates assessing and advising on compliance with established benchmarks and required legislation.

The unit applies to those who apply advanced practical knowledge to coordinate, facilitate and maintain the WHS program in an organisation.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential	*Performance criteria describe the performance needed to*

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ELEMENT	PERFORMANCE CRITERIA
outcomes.	*demonstrate achievement of the element.*
1. Evaluate effectiveness of organisation's WHS hazard identification arrangements	1.1 Identify workplace hazard identification activities and compare 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 hazard identification 1.5 Review outcomes of examinations with specialist personnel, as required 1.6 Document outcomes of examination and report to required personnel according to organisational policies and procedures
2. Evaluate effectiveness of 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, reliability and inclusion of all major WHS risks 2.3 Evaluate implemented risk controls for suitability and effectiveness in relation to the organisation's management of WHS 2.4 Document evaluation outcomes and distribute as required according to organisational policies and procedures
3. Evaluate effectiveness of organisation's WHS monitoring processes	3.1 Identify organisational processes to monitor implementation and status of WHS management 3.2 Evaluate quality of information and data obtained from monitoring processes 3.3 Review effectiveness of communication and reporting processes in relation to monitoring the management of WHS 3.4 Evaluate management's response to issues identified by the monitoring processes 3.5 Document outcomes of evaluation of compliance and

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ELEMENT	PERFORMANCE CRITERIA
	report to required personnel
4. Assess and advise on organisation's WHS compliance with established benchmarks and required legislation	4.1 Identify industry benchmarks and required legislation 4.2 Undertake systematic analysis to assess WHS compliance with established benchmarks and required legislation 4.3 Identify and make recommendations to rectify WHS non-compliance with established benchmarks and required legislation 4.4 Provide advice on compliance and non-compliance with WHS laws with regard to organisation's WHS management arrangements 4.5 Document outcomes of compliance assessment and report to required personnel
5. Assess outcomes of organisation's WHS management arrangements	5.1 Identify organisational processes to be assessed 5.2 Evaluate performance indicators, including positive performance indicators (PPIs), to determine whether they provide a true, reliable and timely measure of effectiveness of organisation's WHS management 5.3 Compare reported performance with evidence gathered, and document differences and noted trends 5.4 Evaluate WHS performance outcomes and document them in a clear and objective manner 5.5 Determine whether arrangements for managing WHS have produced improvement in WHS management 5.6 Document outcomes of assessment and report to required personnel

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets, analyses and evaluates complex organisational texts in relation to WHS policies, procedures, systems, and management arrangements

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Skill	Description
Writing	• Documents information about performance evaluation and compliance, matching style of writing to purpose and audience • Uses appropriate vocabulary, grammatical structure and organisational conventions to produce required documents
Oral communication	• Presents information, evaluation outcomes and recommendations using language appropriate to audience • Uses questioning and active listening to seek clarification or confirm understanding
Numeracy	• Extracts, analyses and synthesises mathematical information in a range of workplace sources • Selects from a range of mathematical and problem-solving strategies and techniques to evaluate WHS data for a range of purposes, including to identify trends • Uses formal and informal oral and written mathematical language and representation to communicate about WHS risk management, evaluation and monitoring
Navigate the world of work	• Keeps up to date on changes to WHS laws or regulations relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work
Interact with others	• Recognises and applies the protocols governing what, with whom and how to communicate when working with specialist personnel
Get the work done	• Uses logical planning processes and an increasingly intuitive understanding of context, to identify relevant information and risks, and to identify and evaluate alternative strategies and resources • Reviews WHS management using systematic and analytical processes to set criteria, gather relevant information, and identify and evaluate options against agreed criteria • Applies formal problem-solving processes when identifying factors impacting on WHS, resolving complex issues in manageable parts • Uses a range of digitally-based technology and applications to access and filter data, and to extract, organise, integrate and share relevant information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS604 Evaluate the WHS performance of organisations.

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Links

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

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Assessment Requirements for BSBWHS613 Evaluate the WHS performance of an organisation

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- evaluate and report on the effectiveness of the work health and safety (WHS) performance of at least one organisation.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws, guidance material and links to other legislation relevant to organisation's WHS performance, including:
  - hazard-specific WHS laws
  - requirements for recordkeeping
  - requirements for reporting, including obligations for notification and reporting of incidents
  - WHS information and data
  - WHS consultation and participation
  - roles of persons conducting a business or undertaking (PCBUs) or officers under WHS laws
- organisational WHS policies, procedures, processes and systems, including those for:
  - developing WHS performance assessment tools, including positive performance indicators (PPIs)
  - formal and informal communication and consultation processes
  - collecting information and data
  - providing evidence of compliance with WHS laws
  - recordkeeping
- legal liability in relation to providing advice

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- nature and use of information and data that provide valid and reliable results about performance of WHS risk-management processes and PPIs, and limitations of other types of measures
- nature of workplace processes (workflow, planning and control) and WHS hazards relevant to workplace
- principles and practices of a systematic approach to managing WHS
- roles and responsibilities in relation to communication and consultation
- sampling methodologies and applications and related statistical measures
- methodologies for identifying and representing trends in performance data
- standard industry risk controls for a range of WHS hazards
- techniques, tools and processes for identifying WHS hazards and controlling associated risks, and their limitations.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace strategic and operational plans, policies and procedures
- WHS information and data
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to conduct a work health and safety (WHS) audit in a work area to establish if an organisation is implementing planned arrangements for managing WHS risks. It involves systematic examination against audit criteria to determine compliance against identified benchmark criteria.

The unit applies to those required to conduct a WHS audit under the guidance of a lead auditor. The WHS audit may be conducted by an individual or by a team, and may be concurrent with other management system audits or conducted as a standalone exercise.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA

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ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare for WHS audit under the guidance of the lead auditor	1.1 Define scope, objectives and benchmarks of audit under lead auditor's guidance 1.2 Identify and obtain relevant documentation about operation of organisation 1.3 Identify and arrange resources required to conduct audit under lead auditor's guidance 1.4 Assign timing, schedule and responsibilities for audit under lead auditor's guidance 1.5 Develop draft audit plan according to organisational policies and procedures under lead auditor's guidance 1.6 Submit draft audit plan to required personnel for consultation and feedback 1.7 Finalise documented plan in response to feedback and distribute to required personnel
2. Select audit tools suitable to nature and scope of WHS audit under the guidance of the lead auditor	2.1 Confirm own and lead auditor role in tool selection process with lead auditor 2.2 Identify range of available WHS audit tools and assess their suitability for intended purpose and work area 2.3 Establish that audit tools can be used with consistent outcomes by all members of audit team 2.4 Review audit tools to ensure they enable collection of evidence in a timely and efficient manner 2.5 Trial audit tools and modify as required
3. Undertake WHS audit activities in work area under the guidance of the lead auditor	3.1 Confirm own and lead auditor role in WHS audit activities with lead auditor 3.2 Undertake preliminary audit meetings and work area familiarisation 3.3 Use selected audit tools and consult with stakeholders to gather WHS information, data and records about work area, as required by the audit plan and according to organisational requirements, standards for safe work practices and applicable WHS laws 3.4 Promptly report uncontrolled hazards and related assessed risks identified during audit to key personnel, stakeholders and/or person in control of workplace

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ELEMENTS	PERFORMANCE CRITERIA
	3.5 Note discrepancies in risk controls and risk management arrangements, and reasons for discrepancies, according to organisational policies and procedures 3.6 Check reliability and validity of WHS information, data and records supporting audit activities with required sources 3.7 Undertake exit audit meetings with required personnel and stakeholders
4. Report on outcomes of WHS audit	4.1 Compare results of audit with audit benchmark criteria 4.2 Develop summary audit findings and recommendations, consulting with stakeholders as required 4.3 Present summary audit findings and recommendations to key personnel 4.4 Document final audit outcomes according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and analyses legislative and organisational texts relevant to WHS audit requirements • Reviews and interprets information and data gathered during audit activities
Writing	• Communicates information about audit plan, matching style of writing to purpose and audience • Drafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions
Oral communication	• Presents information and ideas using vocabulary appropriate to audience and context • Uses questioning and active

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Skill	Description
	listening to facilitate discussion, seek clarification and confirm understanding
Numeracy	• Extracts and evaluates mathematical information embedded in audit data and records • Applies mathematical processes to set timeframes and compare or contrast data
Navigate the world of work	• Identifies own and others' legal responsibilities in relation to WHS audit advice • Keeps up to date on changes to WHS laws relevant to audit, and considers their implications when negotiating, planning and undertaking work
Interact with others	• Applies the protocols governing what, with whom and how to communicate when gathering evidence and consulting • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion • Negotiates agreement on the best course of action regarding audit recommendations
Get the work done	• Uses logical planning processes and understanding of context to plan for audit • Sequences and schedules activities, monitors implementation and manages relevant communication • Involves others in the selection of audit tools or methods, using consultative or collaborative processes as part of the decision-making process when appropriate • Maintains systematic records of data-gathering activities

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Skill	Description
	• Uses systematic and analytical processes in non-routine situations: sets goals, gathers relevant information, and identifies and evaluates options against agreed benchmark criteria • Uses digital systems and tools to access, record, organise, analyse and display information • Validates audit findings and reflects organisational constraints and challenges in audit recommendations

Unit Mapping Information

Supersedes and is equivalent to BSBWHS606 Conduct a WHS audit.

Links

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

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Assessment Requirements for BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- prepare for and conduct one work health and safety (WHS) audit under the guidance of a lead auditor.

During the above, the candidate must:

- outline purpose, scope and objectives of audit in a preliminary meeting
- develop and implement a WHS audit plan suited to the work area, which reflects nature and scope of required audit
- select, develop, trial and modify WHS audit tools suited to audit and work area
- gather information, data and WHS records, consulting required range of workplace personnel
- report on WHS audit outcomes
- make recommendations in areas where improvements are identified
- work effectively under the guidance of a lead auditor.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS legislative responsibilities, duties and obligations of managers, supervisors, workers and persons conducting a business or undertaking (PCBUs) or officers
- WHS legislative requirements regarding:
  - communication, consultation and participation processes in a WHS audit
  - notification of incidents
  - audit recordkeeping
  - hazard identification and risk assessment methods

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- procedures for identifying WHS audit tools and assessing their suitability
- nature and use of information and data that provide valid and reliable results about performance of WHS risk-management processes and positive performance indicators, and limitations of other types of measures
- key components of a WHS audit plan, including:
  - nature of information and data to be collected
  - key audit personnel
  - information and data collection strategies that ensure security, confidentiality, impartiality and equity
  - process that includes opportunities for corroborating performance evidence collected
- principles and practices of WHS audit, including:
  - reflecting understanding of nature of workplace, work processes, and hazards and controls relevant to workplace
  - methods for collecting reliable WHS information and data
  - methods for interviewing those subject to audit, including arrangements to validate audit findings
  - strategies for addressing commonly encountered problems in collection, and adapting to contingencies as they arise to meet WHS legislative and audit outcome requirements
  - methods for collecting evidence of compliance with WHS laws
  - consulting with required personnel, including lead auditor
- key components of audit findings, including:
  - recommendations
  - non-compliances, uncontrolled hazards and associated risks
  - objective evidence and rationale
- procedures for developing and using benchmark criteria during WHS audit, including positive performance indicators (PPIs)
- features of good-practice WHS audit tools
- internal and external sources of WHS information and data, and procedures for accessing them
- requirements for recordkeeping that address WHS, privacy, confidentiality and other legislative requirements
- roles and responsibilities of internal and external personnel as they apply to WHS audit
- legal liability in relation to providing WHS audit advice
- role of lead auditor and own relationship to lead auditor.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- lead auditor

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- organisational documentation, information and data required for WHS audits
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS616 Apply safe design principles to control WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to apply safe design principles to control work health and safety (WHS) risks in a product's life cycle. It involves engaging at different points of the supply chain to provide advice based on safe design principles. The central feature of safe design is the application of relevant information and data about human experience, capabilities and behaviour to the design of objects, facilities, procedures and environments that people use.

The unit applies to those who apply the principles of safe design in their organisation, which may be at one or more stages of the product's life cycle, including procurement, installation, operation and disposal. Products may refer to plant, tools and equipment. The application of safe design principles aims to eliminate or minimise hazards and their associated risks before an existing product, or a product being developed or modified, is introduced into the workplace.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. For the purposes of this unit of competency 'safe design' refers to a process defined as the integration of hazard identification and risk assessment methods to eliminate or minimise the risk of injury throughout the life cycle of plant, tool or equipment being designed.

3. For the purposes of this unit of competency a 'product' refers to any plant, tool or equipment.

4. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

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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 Advise on WHS principles that support safe design	1.1 Advise decision-makers of their duties under WHS laws to manage WHS risks throughout a product's life cycle 1.2 Source and make available to decision-makers the most current information and data on WHS principles, materials, technology and systems that apply to product design 1.3 Advise on methods and tools that can support WHS hazard identification and WHS risk assessment throughout a product's life cycle 1.4 Identify and address learning and development needs of decision-makers to manage WHS risks that may arise during a product's life cycle, including during its design phase 1.5 Advise on consultation with known and/or potential users of the product during the design phase, according to organisational policies and procedures 1.6 Identify situations where specialist and other advisers may be required to support safe design activities
2 Advise on systematic approach to WHS risk management for safe design	2.1 Advise on selection and implementation of required WHS risk controls in design, based on the hierarchy of control measures 2.2 Advise on documentation requirements relating to decision-making during risk assessment process 2.3 Advise on establishment of a residual WHS risk register and distribution of this information to those involved in downstream or subsequent product life-cycle stages 2.4 Advise on monitoring the design as it evolves, to identify and manage potential WHS hazards that may arise during product life cycle and their associated risks 2.5 Identify and address learning and development needs of decision-makers in relation to managing design-related WHS risks in a product's life cycle
3 Advise on consultation	3.1 Support decision-makers in considering the needs of those

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ELEMENT	PERFORMANCE CRITERIA
processes in product's life cycle	using or interacting with product throughout its life cycle 3.2 Facilitate involvement of technical experts as required according to organisational processes and procedures 3.3 Advise on consultation arrangements with required personnel during all phases of design process to identify WHS hazards and control WHS risks that may occur throughout a product's life cycle 3.4 Advise on communicating residual WHS risks in product to those who will use or interact with the product throughout its life cycle
4 Advise on procurement systems to minimise 'purchased' WHS hazards and their associated risks	4.1 Advise decision-makers involved in purchasing and contractual arrangements to include requirements to identify WHS hazards and control WHS risks, and to provide information and data on residual WHS risks as part of procurement process 4.2 Advise on including a requirement to carry out a safe design approach in the design brief or draft specifications

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and analyses legislative and organisational texts relevant to safe design
Writing	• Develops advice and recommendations about safe design, matching style of writing to purpose and audience
Oral communication	• Presents information and advice using language appropriate to audience • Uses questioning and active listening to seek information and confirm understanding
Numeracy	• Selects from and applies a range of mathematical strategies to interpret

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Skill	Description
	and analyse mathematical information embedded in a range of texts • Applies mathematical processes to assess risk levels • Uses oral and written mathematical language and representation to communicate advice on WHS risk management in safe product design
Navigate the world of work	• Applies legal responsibilities to WHS product design compliance contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when advising on compliance in relation to product design
Interact with others	• Actively identifies requirements of communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Monitors impact of communication exchanges when providing advice that relates to safe design • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role
Get the work done	• Uses logical planning processes and understanding of context to organise training and identify specialist needs • Uses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action • Identifies the potential of new

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Skill	Description
	approaches to product life-cycle risk management to enhance safe design work practices and outcomes • Uses digital systems and tools to access, record, organise, analyse, display and share information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS609 Advise on the application of safe design principles to control WHS risks.

Links

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

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Assessment Requirements for BSBWHS616 Apply safe design principles to control WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- apply safe design principles to control work health and safety (WHS) risks that may occur throughout the life cycle of at least two different products.

During the above, the candidate must:

- provide advice based on WHS legislative requirements and safe design principles in relation to:
  - developing a systematic WHS risk-management approach to safe design
  - consultation processes relating to safe design in a product's life cycle
  - procurement systems to minimise 'purchased' WHS hazards and their associated risks.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws, publications and guidelines relating to consultation, participation and safe design, including:
  - Safe Work Australia codes of practice and guidance information that relate to safe design
  - requirements for managing WHS risks and implementing controls at each life-cycle stage of a product
  - requirements relating to consultation processes
  - legislative duties of persons conducting a business or undertaking (PCBUs) or officers who are designers or are responsible for safe design processes
- factors involved in selecting WHS risk controls for product design, including:

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  - ensuring that level and reliability of risk control is commensurate with likelihood and impact of risk
  - impact on safety of alterations to product during its life
  - minimising impact of possible failure or defect by ensuring controls include fail-safe action
- WHS principles, materials, technology and systems that apply to product design
- internal and external sources of WHS information and data, and procedures for accessing them
- human cognitive and perceptual capabilities and other basic factors relevant to the safe design of products in the performance evidence
- factors affecting safe design, including work-related psychosocial factors, occupational violence, shift work, repetitive work, awkward postures, lighting, thermal environment and work layout
- principles of anthropometry and biomechanics as they relate to safe design principles to control WHS risks
- communication and consultation processes, and key personnel related to communication
- hierarchy of control measures and criteria for choosing between different WHS risk controls
- key personnel, including change agents, within workplace management structure
- legal liability in relation to providing advice
- organisational behaviour and culture as they impact on WHS, and on change
- WHS risk management and the principles and practices of a systematic approach to WHS management.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports from other parties consulted about WHS risk in a product's life cycle
- legislation, standards, guidelines, research and industry data required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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Links

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BSBWHS617 Apply ergonomics to manage WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to apply the principles, processes and methods of ergonomics to work health and safety (WHS) risk management, and to the enhancement of WHS-related planning and design activities and processes.

The unit applies to those who manage WHS risks and who need to consider the role ergonomics plays in this process. These individuals will apply advanced skills and knowledge to coordinate, facilitate and maintain the WHS program in an organisation. This role may involve working with ergonomists or human-factor specialists.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

3. Ergonomics applies theories, principles, data and methods to design in order to optimise human wellbeing and overall system performance.

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

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Apply ergonomics to WHS hazard identification	1.1 Identify and evaluate relevant WHS laws, organisational policies and procedures relating to ergonomics 1.2 Interpret workplace WHS information and data to identify WHS hazards relating to ergonomics 1.3 Apply knowledge of ergonomics principles, processes and methods to identify workplace WHS hazards
2. Use ergonomics to address WHS risks	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 Analyse WHS-related planning and design activities and processes 3.2 Assess opportunities to apply 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 according to organisational policies and procedures
4. Ensure that ergonomics activities are compliant and appropriate	4.1 Review ergonomics activities to confirm their compliance with applicable WHS laws and other relevant documents 4.2 Review ergonomics activities to confirm their compliance with relevant organisational processes, procedures, standards and systems 4.3 Apply appropriate ergonomics principles, processes and methods according to available resources and own role, responsibilities, skills and knowledge 4.4 Seek advice, support and input from specialists as required according to organisational policies and procedures

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and analyses legislative and organisational texts relevant to ergonomic activities
Writing	• 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 structures and organisational conventions
Oral communication	• Uses questioning and active listening to seek information and confirm understanding
Navigate the world of work	• Identifies own responsibilities regarding ergonomic activities in WHS compliance contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work • Contributes, as appropriate, to the work of others in the immediate work context when applying ergonomics
Interact with others	• Selects and uses appropriate conventions and protocols to build and maintain relationships with external people who can provide specialist support
Get the work done	• Uses logical planning processes and understanding of context to identify where ergonomics can be applied in the workplace • Sequences and schedules activities, monitors implementation and manages relevant communication • Uses systematic and analytical

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Skill	Description
	processes in non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action • Identifies the potential of new approaches in applying ergonomics to enhance work practices and outcomes • Uses digital systems and tools to access, record, organise, analyse and display information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS607 Apply ergonomics to manage WHS risks.

Links

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

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Assessment Requirements for BSBWHS617 Apply ergonomics to manage WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- identify at least three different work health and safety (WHS) hazards relating to ergonomics, and manage their associated risks
- apply ergonomic interventions in at least two different WHS-related planning and design activities
- seek specialist input during at least one of the above activities.

During the work, the candidate must ensure these ergonomics activities are:

- compliant with:
  - legislative requirements
  - organisational policies and procedures
  - applicable professional standards
- appropriate to:
  - available resources
  - own role and capabilities.
  -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- ergonomics-related content of applicable WHS laws and other relevant documents, such as policies, standards, guidance publications and alerts issued by the relevant WHS regulators and professional bodies
- organisational policies and procedures relating to ergonomics and the performance evidence

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- key theories, principles, data and methods relating to ergonomics, and the domains of specialisation within the discipline of ergonomics
- principles, processes and methods of ergonomics applicable to:
  - identifying WHS hazards and managing associated risks
  - WHS-related planning and design activities and processes
- expertise, roles and functions of ergonomists, and skills and techniques relevant to the performance evidence
- scope and broad content of Australian and international ergonomics standards
- systems and system concepts used in ergonomics.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws required to demonstrate the performance evidence
- reports from other parties consulted when developing ergonomic interventions
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to apply occupational hygiene principles, knowledge, skills and techniques to manage work health and safety (WHS) risks. It includes identifying workplace hazards and managing risks associated with occupational hygiene, and engaging specialist assistance. It requires in-depth knowledge of the hierarchy of control measures and its use in developing risk control strategies for occupational hygiene. The unit also includes ensuring that occupational hygiene activities are appropriate, and that training needs are met.

The unit applies to those who apply occupational hygiene principles to manage WHS risks.

NOTES

1. For the purposes of this unit of competency 'occupational hygiene' refers to the use of science and engineering to measure the extent of worker exposure to something in the work environment that has the potential to cause harm. An occupational hygiene approach to WHS risks uses science and engineering to design and implement appropriate risk control strategies to prevent ill health caused by the work environment.

2. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

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

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Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify WHS hazards to be addressed by occupational hygiene	1.1 Identify and evaluate relevant WHS laws, organisational policies and procedures relating to occupational hygiene 1.2 Use workplace WHS information to identify exposure to WHS hazards that could give rise to worker ill health 1.3 Apply knowledge of occupational hygiene principles, skills and techniques to identify workplace WHS hazards to be addressed through occupational hygiene 1.4 Determine and document sources of exposure to identified hazards 1.5 Identify and document situations where WHS specialists and other advisers may be required according to organisational policies and procedures
2. Assess identified occupational hygiene risks	2.1 Select and use occupational hygiene equipment and techniques for assessing occupational hygiene risks relating to identified hazards according to organisational policies and procedures 2.2 Analyse and interpret results of assessments according to organisational policies and procedures, and exposure standards 2.3 Consult with specialists as required according to organisational policies and procedures to inform recommendations 2.4 Report results of risk assessments, interpretations and recommendations to required personnel
3. Design and implement risk controls	3.1 Apply the hierarchy of control measures when assisting with design of risk controls for assessed risks 3.2 Analyse information and data to identify deficiencies in existing risk controls 3.3 Implement suitable new risk controls and assist in providing remedial advice about existing risk controls according to organisational policies and procedures 3.4 Ensure effective consultation with, and participation of,

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ELEMENTS	PERFORMANCE CRITERIA
	required internal personnel 3.5 Access external sources of information and data, WHS specialists and other advisers as required about nature and level of health hazards, risks and risk controls
4. Monitor, evaluate and modify risk controls	4.1 Monitor and evaluate risk controls to address risks relating to occupational hygiene in consultation with required personnel 4.2 Modify risk controls in consultation with required personnel 4.3 Identify and document training needs associated with risk controls and arrange training in consultation with required personnel 4.4 Make recommendations about future arrangements for monitoring and evaluating risk controls
5. Confirm occupational hygiene activities are appropriate	5.1 Confirm that occupational hygiene activities comply with required WHS laws 5.2 Confirm that occupational hygiene activities comply with required organisational procedures, processes, standards and systems 5.3 Apply appropriate occupational hygiene principles, knowledge, skills and techniques according to available resources and own role, responsibilities, skills and knowledge 5.4 Seek advice, support and input from specialists and other advisers as required and appropriate

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, interprets and analyses legislative and organisational texts relevant to occupational hygiene activities
Writing	• Matches style and content of report writing to purpose, audience and organisational reporting requirements • Drafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions
Oral communication	• Presents information and ideas using language appropriate to audience • Uses questioning and active listening to seek information and confirm

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Skill	Description
	understanding
Numeracy	• Uses equipment to take measurements • Selects from and applies a range of mathematical strategies to interpret and analyse measurements • Uses oral and written mathematical language and representation to communicate test results
Navigate the world of work	• Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work • Contributes to the work of others in occupational hygiene contexts
Interact with others	• Collaborates with others to achieve joint outcomes • Selects and uses suitable conventions and protocols to build and maintain relationships with people who can provide external specialist support
Get the work done	• Uses logical planning processes and understanding of context in identifying hazards and managing risks addressed by occupational hygiene • Uses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action • Identifies potential of new approaches to enhancing work practices and outcomes in relation to application of occupational hygiene risk controls • Uses digital systems and tools to access, record, organise, analyse and display information

Unit Mapping Information

Supersedes and is equivalent to BSBWHS608 Assist with applying occupational hygiene to manage WHS risks.

Links

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

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Assessment Requirements for BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- apply occupational hygiene principles, processes, skills and techniques in managing at least two different work health and safety (WHS) hazards that present occupational hygiene risks to workers, using:
  - workplace WHS information
  - knowledge of WHS laws, and organisational policies and procedures relating to occupational hygiene
  - knowledge of occupational hygiene principles, processes, skills and techniques
  - the hierarchy of control measures to design and implement risk controls
- seek specialist input or advice during at least one of these activities.

During the above, the candidate must:

- assess occupational hygiene risk associated with these WHS hazards
- monitor, evaluate and modify risk controls relating to occupational hygiene
- ensure occupational hygiene activities are legislatively and organisationally compliant and appropriate.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws relating to occupational hygiene, including roles and responsibilities of persons conducting a business or undertaking (PCBUs) or officers under WHS laws
- exposure standards and other standards and guidelines used in occupational hygiene, including their limitations and practical applications
- occupational hygiene principles, knowledge, skills, techniques and methodologies

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- characteristics of WHS hazards and risks addressed by occupational hygiene, their effects on people and how these effects occur
- common risk controls for a range of environmental hazards and associated occupational hygiene risks, their effectiveness and their limitations
- organisational policies, procedures, processes and systems relating to occupational hygiene and the performance evidence
- key principles, uses and components of the hierarchy of control measures in managing risks associated with occupational hygiene, including:
  - nature and scope of risk controls
  - requirements for selecting personal protective equipment (PPE), and limitations of its use
- key concepts, processes and procedures for applying occupational hygiene in managing WHS risks:
  - sources of environmental hazards and routes of exposure to them
  - sources of occupational disease and its prevention
  - risks addressed by occupational hygiene
  - developing, implementing and evaluating occupational hygiene risk controls
  - methods for occupational hygiene assessments and investigations
  - training, education, roles, functions and skills of occupational hygienists
  - types, purposes, functions and uses of occupational hygiene equipment
  - requirements for individual training and instruction in risk controls, including in the use of PPE
- workplace processes, activities, jobs and tasks relevant to occupational hygiene
- roles and functions of specialists, including occupational hygienists, occupational medicine physicians, other medical doctors and toxicologists
- procedures for working with occupational hygiene specialists and other WHS personnel to control WHS risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, standards and guidelines required to demonstrate the performance evidence
- occupational hygiene equipment that meets relevant standards for function and performance
- organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

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Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXBD401 Capture and store big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to capture and store transactional and non-transactional big data obtained from a variety of sources. It involves using methodologies and techniques to obtain big data sets. It also involves analysing and storing the captured big data according to industry practices and organisational policies, procedures and protocols.

It applies to those in a broad range of industries and job roles who, under some supervision and guidance, are responsible for obtaining, preparing and storing big data.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine scope of big data capture	1.1 Identify business need for big data capture 1.2 Determine timelines for capturing big data 1.3 Identify volume and variety of big data to be captured 1.4 Identify data storage and archive requirements
2. Capture big data	2.1 Develop a plan for big data capture according to organisational policies and procedures 2.2 Identify sources of big data relevant to business need 2.3 Obtain big data from identified sources according to legislative requirements and organisational policies and procedures

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ELEMENT	PERFORMANCE CRITERIA
	2.4 Apply big data cleansing methodologies 2.5 Re-create and recover big data lost during capture process according to organisational policies and procedures 2.6 Conduct data offload and archiving on big data and create report
3. Store captured big data	3.1 Organise obtained big data sets in a retrievable format 3.2 Confirm that big data is accurate, up-to-date, and comprehensive 3.3 Securely store big data and data capture report according to organisational procedures, legislative requirements, and industry practices

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets numerical data • Completes at times complex calculations and records numerical data
Oral communication	• Asks open and closed probing questions and actively listens to identify work requirements
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Writing	• Uses clear, specific and industry-related terminology to report on big data capture and storage
Planning and organising	• Efficiently and logically sequences the stages of big data capture and storage
Technology	• Uses appropriate technology platforms to capture and store big data

Unit Mapping Information

No equivalent unit. New unit.

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Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD401 Capture and store big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- capture, apply data cleansing, and store one set of transactional and one set of non-transactional big data relating to specific workplace needs
- create a report relating to data capture for a specific workplace need for at least one set of transactional and one set of non-transactional big data.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to big data capture and storage, including data protection, security and privacy laws and regulations
- organisational policies and procedures relating to big data capture and storage, including for:
  - capturing, storing and reporting transactional and non-transactional sources of big data
  - cleansing methodologies when capturing big data
  - business intent of big data capture
  - re-creating and recovering big data lost during capture process
  - privacy concerns of predictive analytics organising security and retrieval of big data
  - quality assuring captured big data
- data capture techniques to produce analytic ready data and datasets
- big data features and their impact on data capture and storage, including velocity, volume, variety, value, and veracity
- variability and complexity of big data:
  - structured and unstructured
  - transactional and non-transactional
- framework for distributed storage of big data

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- platform solutions for capturing and storing big data
- key features of organisational products and services related to big data capture
- technologies, techniques and protocols for capturing, storing and retrieving big data
- secure data access and control mechanisms of captured and stored big data
- high availability and scalability challenges with big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform big data capture
- information and telecommunications equipment required to capture and store big data
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD402 Test big data samples

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to test captured transactional and non-transactional big data samples prior to using them in the organisation. It involves assembling or obtaining raw big data, processing that big data, and testing it in a way that enables it to be used more broadly within the organisation.

It applies to those who work in a broad range of industries using data analysis techniques in the management of their day-to-day work.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Validate assembled or obtained big data sample	1.1 Establish a sampling strategy for big data testing and identify a representative sample for big data testing 1.2 Assemble or obtain sample of raw big data according to legislative requirements and organisational policies and procedures 1.3 Validate big data sample from various sources to ensure that big data is correct
2. Validate big data sample process and business logic	2.1 Align datasets to relevant parts of the organisation 2.2 Implement data aggregation and segregation rules on a small set of sample data and datasets

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Consult with required personnel to clarify and resolve identified anomalies 2.4 Conduct performance testing for data throughput, data processing and sub-component performance
3. Validate output of captured big data sample and record results	3.1 Design, formulate and select suitable test scenarios and test cases to validate output of big data sample 3.2 Implement selected test scenarios and test cases with big data sample using common testing tools and according to organisational procedures 3.3 Isolate sub-standard data and correct data acquisition paths as required 3.4 Generate and store results of validation activity and associated supporting evidence according to organisational policies and procedures, and legislative requirements
4. Optimise big data sample results and documentation	4.1 Perform data cleansing on big data sample following testing according to industry practices and organisational procedures 4.2 Collate validated output of testing, confirming absence of big data corruption in sample 4.3 Recommend configuration optimisation changes based on performance testing results 4.4 Communicate final sample results to required personnel

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Oral communication	• Asks open and closed probing questions and actively listens to feedback during big data testing
Numeracy	• Interprets numerical data • completes at times complex calculations and records numerical data
Reading	• Identifies and interprets information from relevant sources to complete work
Writing	• Uses clear, specific and industry-related terminology to represent test results

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Skill	Description
Planning and organising	• Efficiently and logically sequences the stages of big data testing
Technology	• Uses appropriate technology platforms and query languages and scripts to test big data

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD402 Test big data samples

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- test two different big data samples: one transactional and one non-transactional
- conduct performance testing on two different big data samples: one transactional and one non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to testing big data sources, including data protection and privacy laws and regulations
- industry protocols and procedures required to write queries and scripts for big data testing
- organisational policies and procedures relating to testing big data sources, including:
  - assembling and obtaining raw big data
  - performing data cleansing following extract, transform and load (ETL) testing
  - isolating sub-standard data and correcting data acquisition paths
  - quality assuring output
  - testing transactional and non-transactional sources of big data
  - storing test results and associated support evidence
- big data validation protocols, including:
  - big data testing methodologies
  - test scripting
- features and formats of common big data sources, including:
  - batched
  - real time
  - interactive
- protocols and techniques for:

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- performance testing big data throughput
- processing and reporting issues.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to test big data sources
- big data sets to be tested
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD403 Analyse big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to analyse transactional and non-transactional big data in order to provide insights that are used in an organisation. It involves identifying trends and relationships within big data, and establishing data acceptability. It also involves forming recommendations based on the analysis, and reporting on analysis findings.

It applies to those who work in a broad range of industries and job roles using big data analysis techniques in their day-to-day work.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine purpose and scope of big data analysis	1.1 Determine organisational requirements for big data analysis 1.2 Identify internal and external sources of big data to be analysed according to organisational policies and procedures and legislative requirements 1.3 Establish and confirm parameters to be applied in analysis according to organisational policies and procedures
2. Analyse initial	2.1 Categorise and prepare captured big data for analysis

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ELEMENT	PERFORMANCE CRITERIA
trends and relationships in captured big data	2.2 Extract and transform structured and unstructured big data in preparation for data analysis 2.3 Analyse big data and derive insights into trends using required tools and dashboards
3. Finalise big data analysis	3.1 Conduct statistical analysis to confirm accuracy of big data analysis 3.2 Isolate and remove identified incorrect results 3.3 Develop report on key outcomes from analysis 3.4 Store analytics results, associated report and supporting evidence according to organisational policies and procedures, and legislative requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Uses mathematical and statistical concepts required to analyse big data • Completes at times complex calculations and records numerical data
Reading	• Identifies and interprets information from sources to complete work
Writing	• Uses clear, specific and industry-related terminology to represent outcomes of big data analysis in reports
Planning and organising	• Efficiently and logically sequences the stages of big data analysis
Technology	• Uses appropriate technology platforms to analyse big data • Basic programming to conduct big data analysis

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD403 Analyse big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse trends and relationships in two different sets of big data: one transactional and one non-transactional
- report on the results and insights from each analysis
- store analytics results from each of the two big data sets according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- purpose and benefits to organisation of big data analysis
- legislative requirements relating to analysing big data, including data protection and privacy laws and regulations
- organisational policies and procedures relating to analysing big data, including for:
  - identifying big data sources
  - establishing and confirming categories to be applied in analysis
  - analysing data to identify business insights
  - integrating big data sources, including structured, semi-structured, and unstructured
  - combining external big data sources, such as social media, with in-house big data
  - reporting on analysis of big data, including the use of suitable reporting and business intelligence (BI) tools
- industry protocols and procedures required to write basic queries to search combined big data
- required analytical techniques and tools to analyse transactional and non-transactional big data, including:
  - data mining
  - ad hoc queries

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  - operational and real-time business intelligence
  - text analysis
- statistical concepts relating to big data analytics
- relationship between raw big data and big datasets
- common models and tools to analyse big data, including features and functions of Excel software for advanced analytics of external big data
- sources of uncertainty within big data
- classification categories of analytics, including text, audio/video, web and network
- role of technology and automation tools in performing big data analytics.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to analyse big data
- big data sets to be analysed
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD404 Use big data for operational decision making

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to analyse, interpret and apply insights from big data when making operational decisions. It involves applying skills in decision making and techniques for using big data in day-to-day work.

It applies to those who work in leadership and management positions, including in their own small business, in a broad range of industries who use big data analytics to drive their operational decision making.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify business requirements relating to big data	1.1 Scope and confirm operational decision-making requirements 1.2 Identify opportunities for use of big data in business decision making 1.3 Confirm nature and scope of report requirements
2. Interpret big data sources and summaries	2.1 Access required big data sources and summaries according to organisational policies and procedures and legislative requirements 2.2Apply insight analysis and descriptive statistics that support operational decision making 2.3 Use findings to identify insights that relate to identified operational decision-making requirements

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ELEMENT	PERFORMANCE CRITERIA
3. Make operational decision based on big data analysis	3.1 Draft report on data analytics, applying identified insights to operational decision-making requirements 3.2 Seek input and integrate feedback from required stakeholders according to organisational policies and procedures 3.3 Finalise and distribute recommendations to required personnel according to organisational and legislative requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Uses mathematical concepts and statistics required to use big data for operational decision-making • Completes at times complex calculations and records numerical data
Oral communication	• Asks open and closed probing questions and actively listens when seeking input and feedback
Reading	• Identifies and interprets information from relevant sources to complete work
Writing	• Uses clear, specific and industry-related terminology to represent outcomes of big data analysis in reports
Planning and organising	• Efficiently and logically sequences big data analytics to draw out insights and trends
Technology	• Uses appropriate technology platforms when using big data

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD404 Use big data for operational decision making

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- interpret and use a big data set as the basis for two different operational decisions in work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to accessing and using sources and summaries of big data and big data sets, including data protection and privacy laws and regulations
- organisational policies and procedures relating to using big data, including for:
  - scoping and confirming operational decision-making requirements
  - accessing big data sources and summaries
  - combining external big data sources, such as social media, with in-house big data sets
  - integrating big data and analytics into operational workflow
  - reporting on use of big data in relation to operational decisions described in performance evidence
  - seeking input and feedback from required stakeholders
  - distributing report on big data analytics
- operational decision-making requirements relating to use of big data, including timelines
- procedures for data-driven decision making, including what-if analysis scenarios and tools for optimisation and simulations
- techniques for presenting big data analytics:
  - charts
  - heat maps
  - scatterplots
  - dashboards

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  - statistical tools
- key programming protocols and techniques required to use big data for operational decision making
- domain knowledge of business processes required to demonstrate the performance evidence.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to analyse and use big data sets
- big data sources and summaries suited to business requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD405 Develop procedures for managing big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to design and develop procedures for managing transactional and non-transactional big data in line with industry practices and organisational policies, procedures and protocols.

It applies to those in a range of industries and job roles who develop procedures that support an organisation in effectively managing its handling of big data.

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

Unit Sector

Data Literacy - Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Plan big data management procedures	1.1 Confirm purpose and target users of big data management procedures 1.2 Review current internal practices for managing big data 1.3 Identify and document workplace issues and needs to be supported by big data management procedures
2. Design procedures for managing big data	2.1 Compare current organisational processes to industry standards for best practice in big data management to identify areas of improvement 2.2 Analyse available big data management solutions 2.3 Establish criteria for an effective big data management solution 2.4 Select appropriate big data management solution based on characteristics of big data and workplace needs

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ELEMENT	PERFORMANCE CRITERIA
3. Draft procedures for managing big data	3.1 Draft procedures to address identified organisational needs to manage big data 3.2 Engage required stakeholders to test draft big data procedures 3.3 Integrate feedback from stakeholders into revised procedures
4. Finalise developed procedures for managing big data	4.1 Review big data management procedures against business strategies and success metrics and revise as required 4.2 Create a big data road map for implementing big data management process 4.3 Distribute final procedures to required personnel according to organisational policies and procedures 4.4 Store procedures according to established document management protocols

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Oral communication	• Asks open and closed probing questions and actively listens to identify work requirements and seek feedback from stakeholders
Reading	• Identifies and interprets information from relevant sources to complete work
Writing	• Uses clear, specific and industry-related terminology to communicate big data management procedures
Planning and organising	• Efficiently and logically sequences the stages in developing procedures for managing big data
Technology	• Uses appropriate technology platforms to develop procedures for managing big data

Unit Mapping Information

No equivalent unit. New unit.

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Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD405 Develop procedures for managing big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop procedures for managing two different sets of big data: one transactional and one non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to managing big data, including data protection and privacy laws and regulations
- key characteristics of big data
- organisational policies, procedures, and protocols relating to developing procedures for managing transactional and non-transactional big data, including for:
  - identifying and documenting workplace issues to be supported by big data management procedures
  - reviewing internal programs for managing big data
  - storing and retrieving big data
- industry practices relating to ethical management and governance of big data, including when making data available for big data analytics and business intelligence
- data management approaches to big data based on volume, variety and complexity of data
- protocols for database management, including open-source database management systems designed to handle big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

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- information and telecommunications equipment required to manage big data
- big data sets suited to requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD406 Present big data insights

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to present insights relating to transactional and non-transactional big data in a format that is appropriate and accessible to the work area requesting it.

It applies to those who use big data analysis and presentation techniques in their day-to-day work in a broad range of industries and job roles.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to present big data insights	1.1 Confirm business requirements for presenting big data insights 1.2 Determine context and target audience for presentation 1.3 Identify required big data relevant to business requirements
2. Develop presentation of big data insights	2.1 Create and test proof of concepts for presenting identified business solution 2.2 Identify key features and trends of captured big data in context of purpose and intended audience of presentation 2.3 Generate big data models based on key performance indicators for big data presentation 2.4 Produce interactive dashboards and other models that visualise

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ELEMENT	PERFORMANCE CRITERIA
	identified data insights
3. Finalise presentation of big data insights	3.1 Present big data to required stakeholders in a format that meets business needs 3.2 Seek feedback from required stakeholders on presented big data according to organisational policies and procedures 3.3 Integrate feedback into big data presentation

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Completes at times complex calculations and record numerical big data
Oral communication	• Asks open and closed probing questions and actively listens when consulting with stakeholders
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Teamwork	• Works collaboratively with interdisciplinary teams to identify captured big data sets relevant to presentation
Writing	• Uses clear, specific and industry-related terminology to report on big data capture • Presents big data in a clear and logical manner
Planning and organising	• Efficiently and logically sequences the stages of presenting big data
Technology	• Uses appropriate technology platforms to present big data

Unit Mapping Information

No equivalent unit. New unit.

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Links

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Assessment Requirements for BSBXBD406 Present big data insights

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- present the insights obtained from two different sets of big data using interactive dashboards and other models that serve to best visualise the insights.

One of the above sets must be transactional big data and one must be non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- importance and benefits of big data presentation
- strategies for determining requirements for presenting big data, including analysis of business areas that need improvement
- methodology for conducting exploration and discovery of new and big data, including:
  - visualisation software to combine data from various sources to drive better business insights
  - business intelligence tools to discover and present hidden insights in data sets
- structured, semi-structured and unstructured big data visualisation tools and techniques
- organisational policies, procedures and protocols relating to presenting transactional and non-transactional big data insights, including:
  - using statistical graphs, plots, and information graphics to communicate big data insights
  - seeking feedback from stakeholders on presented big data
- in-house and external sources of big data
- appropriate methods and tools for creating and representing big data reports, including:
  - charts

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  - heat maps
  - scatterplots
  - dashboards
  - interactive maps
  - real-time data
- design approaches for visualising big data, including key performance indicators for the big data presentations in the performance evidence
- dashboard design principles, including audience, context and aesthetics.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment and technology required to present and visualise big data
- big data suited to business requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBXBD407 Protect big data integrity

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to protect and monitor the integrity of transactional and non-transactional big data in an organisation.

It applies to those who work in a broad range of industries and job roles who are responsible for protecting the integrity of big data when managing, storing and transferring it.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to protect integrity of big data	1.1 Identify big data set to be protected 1.2 Review workplace governance arrangements in place for protecting the integrity of big data 1.3 Verify security of big data platform, including cloud security, according to organisational policies and procedures 1.4 Confirm security arrangements in place relating to big data secure storage and transaction logging
2. Apply policies to protect big data	2.1 Apply privacy policies to all data assets that require privacy protection 2.2 Apply security policies to all data assets that require confidentiality 2.3 Apply intellectual property policies to all data assets that contain private and confidential business information

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ELEMENT	PERFORMANCE CRITERIA
3. Monitor big data integrity	3.1 Check encryption and undertake real-time monitoring of logs to identify anomalies that arise 3.2 Identify and report malfunctioning infrastructure and any attacks on infrastructure that pose a threat to data integrity 3.3 Conduct privacy impact assessments on big data 3.4 Confirm that data protection practices comply with required standards
4. Respond to breaches in big data integrity	4.1 Identify where big data breaches have occurred according to organisational policies and procedures 4.2 Escalate data breach incidents according to organisational policies 4.3 Consult with required internal and external stakeholders and communicate breach efficiently 4.4 Audit big data breaches and report findings 4.5 Support management with post-breach and audit reviews

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Completes and manipulates at times complex calculations and records numerical data
Reading	• Interprets at times complex big data and breach information
Oral communication	• Asks open and closed probing questions and actively listens when consulting with stakeholders
Writing	• Uses clear, specific and industry-related terminology to complete and update audits and reports
Planning and organising	• Efficiently and logically sequences the stages of protecting the integrity of big data
Technology	• Uses appropriate technology platforms protect to protect the integrity of big data

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Unit Mapping Information

No equivalent unit. New unit.

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Assessment Requirements for BSBXBD407 Protect big data integrity

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- protect the integrity of two different sets of big data in a work area: one set must be of transactional big data and one set of non-transactional big data.

During the above, the candidate must apply data protection policies and protocols.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements and standards relating to protecting the integrity of big data, including data protection and privacy laws and regulations
- organisational policies, procedures and protocols relating to protecting the integrity of transactional and non-transactional big data, including for:
  - ensuring accuracy, availability and scalability of big data
  - verifying security of big data platform
  - monitoring data discrepancies between different sources
  - monitoring big data integrity
  - identifying where big data breaches have occurred
  - ethical management and governance of big data, including consideration of ensuring a balance between availability and confidentiality of big data
- key components of workplace governance arrangements relating to protection, performance, scalability and availability of big data, including:
  - procedures for creating and maintaining inventory of big data assets
  - policies to prevent big data being used inappropriately
- protocols for dynamic and scalable access control of big data

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- compliance requirements and regulations relating to big data loss
- key components of policies in place for protecting the confidential and private business information and intellectual property in big data assets:
  - privacy policies
  - security policies
  - intellectual property policies
- infrastructure security, integrity and reactive security as they relate to protecting the integrity of big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to protect the integrity of big data
- big data sets suited to requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD408 Implement and review procedures for managing big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to implement and review workplace procedures for managing transactional and non-transactional big data.

It applies to those who work in a broad range of industries and job roles who are required to make business decisions regarding big data procedures to ensure continuous improvement.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare to implement procedures for managing big data	1.1 Plan implementation strategies for selected workplace procedures for managing big data 1.2 Establish reporting mechanisms to monitor impact of implemented procedures
2. Implement procedures for managing big data	2.1 Communicate procedures to relevant stakeholders 2.2 Carry out change management initiatives to encourage adoption of procedures
3. Review	3.1 Seek feedback from required stakeholders on effectiveness and impact

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ELEMENT	PERFORMANCE CRITERIA
procedures for managing big data	of newly implemented procedures and continuous improvement opportunities 3.2 Draft report on review outcomes and recommend required changes to procedures 3.3 Seek feedback from required stakeholders on report and its recommendations according to organisational policies and procedures 3.4 Update procedures based on stakeholder feedback and store according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets numerical data
Oral communication	• Asks open and closed probing questions and actively listens to identify work requirements when consulting with stakeholders and discussing key procedural information
Reading	• Identifies and interprets information from relevant sources to inform review of procedures
Writing	• Uses clear, specific and industry-related terminology to develop procedures
Teamwork	• Works collaboratively with interdisciplinary teams to ensure procedures are implemented
Technology	• Uses appropriate technology platforms to facilitate procedure implementation

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXBD408 Implement and review procedures for managing big data

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement procedures for managing two different sets of big data, one of which must be transactional and one non-transactional
- review and report on effectiveness of the implemented procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies, procedures and protocols to implement and review workplace procedures for managing big data, including for:
  - communicating to and seeking feedback from required stakeholders
  - updating big data procedures
  - storing records associated with big data procedures
  - reporting on implemented procedures
- key features of strategies to implement procedures for managing big data
- techniques for stakeholder management
- trends within big data management
- change management techniques to facilitate implementation of procedures.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform implementation and review of procedures for managing big data

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- information and telecommunications equipment required to implement and review procedures for managing big data
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXBD501 Develop big data strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to develop a big data strategy that reflects the needs and capabilities of an organisation and supports its business goals. It involves applying business processes and information relating to policy issues and new and emerging technologies during strategy development.

It applies to those who work in a broad range of industries and job roles who lead strategic approaches to big data analysis.

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

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish business case for big data strategy	1.1 Confirm organisational support for incorporating big data into overall business strategy 1.2 Form multi-disciplinary team to steer development of big data strategy 1.3 Identify and prioritise business needs that require big data solutions 1.4 Map available data sources to identified business needs 1.5 Determine financial value of applying big data solutions
2. Develop and review proof of concept for big	2.1 Conduct trial using big data to solve prioritised business needs 2.2 Compare proof-of-concept big data results to existing organisational data

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ELEMENT	PERFORMANCE CRITERIA
data strategy	2.3 Identify risks and benefits of scale-up of big data solution across the organisation 2.4 Document benefits and risks related to big data strategy
3. Draft and consult on big data strategy	3.1 Scope big data strategy based on relevant policy issues and new and emerging technologies and platforms 3.2 Draft big data strategy and its governance requirements in line with organisational requirements 3.3 Seek and integrate feedback on draft strategy from key stakeholders 3.4 Finalise draft strategy and distribute to required personnel
4. Develop big data road map supporting business strategy	4.1 Draft big data road map that incorporates big data policy issues 4.2 Seek and integrate feedback on draft road map according to organisational policies and procedures 4.3 Distribute and store final version big data strategy according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements for big data strategy
Numeracy	• Interprets and records mathematical information • Completes at times complex mathematical calculations
Oral communication	• Asks open and closed probing questions and actively listens to identify business requirements
Writing	• Uses clear, specific and industry-related terminology to report on big data capture and storage
Teamwork	• Works collaboratively with interdisciplinary teams to gather the required information to inform and develop strategy
Planning and organising	• Efficiently and logically sequences the stages of developing big data strategy
Technology	• Uses appropriate technology platforms to develop big data strategy

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Unit Mapping Information

No equivalent unit. New unit.

Links

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Assessment Requirements for BSBXBD501 Develop big data strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop one big data strategy for a work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to big data strategy, including data protection and privacy laws and regulations
- organisational processes, policies, procedures and protocols to develop big data strategy, including for:
  - creating inventory of big data assets
  - seeking and integrating feedback on draft strategy
  - distributing and storing final version of big data strategy
- organisational requirements to be reflected in big data strategy:
  - key factors set out in business case
  - potential infrastructure changes required for strategy implementation
  - training requirements associated with big data strategy
  - financial impact of big data strategy
- key components of big data strategies, including requirement to ensure:
  - balance between availability and confidentiality of big data
  - support for a highly available big data management system with fault-tolerant failover services
- factors to be reflected in big data strategies, including:
  - big data policy issues relating to security, intellectual property, governance and privacy
  - new and emerging technologies and platforms of relevance to strategies.

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Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform development of big data strategy, including business strategy documents
- information and telecommunications equipment required to develop big data strategy
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBXCM301 Engage in workplace communication

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to communicate (through written, oral and nonverbal form) in the workplace within an industry.

This unit applies to a wide range of workers, but has a specific focus on the communication skills required for workers with limited responsibility for others.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Plan workplace communication	1.1 Establish audience and purpose of workplace communication 1.2 Identify information needs and communication requirements of intended recipients of workplace communication 1.3 Establish methods of communication available to convey message or information based on work context 1.4 Select appropriate method(s) of communication to convey messages or information 1.5 Plan content of message or communication

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2. Undertake routine communication	2.1 Communicate message or information according to organisational requirements and in a manner that is respectful and clear in meaning 2.2 Adjust communication methods to enable effective communication with those from diverse backgrounds as required 2.3 Receive workplace information and instructions, and interpret and clarify as needed 2.4 Respond to communications according to requirements of the message 2.5 Identify and report any communication challenges to appropriate person
3. Participate in workplace communication	3.1 Clearly contribute ideas and information to workplace discussions 3.2 Support others to communicate in workplace discussions through courteous and professional behaviour 3.3 Use active listening and questioning techniques to clarify issues in a group situation 3.4 Seek feedback from others on effectiveness of communication

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Navigate the world of work	• Understands nature and purpose of own role and associated responsibilities and how it contributes to organisational goals and outcomes
Get the work done	• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement • Uses digital technology to find, record or communicate basic information

Unit Mapping Information

No equivalent unit. New unit.

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Assessment Requirements for BSBXCM301 Engage in workplace communication

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- identify the most appropriate method of communication for the intended audience
- prepare written material that is clear in meaning and format according to organisational requirements
- demonstrate active listening and questioning techniques in a workplace discussion
- communicate information and ideas verbally in a workplace discussion, considering the needs of those from diverse backgrounds
- identify and report any communication challenges to superiors
- seek feedback from others on effectiveness of communication
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
  - ethical behaviour guidelines from state or federal governments
  - workplace policies
  - codes of conduct
  - organisational reputation and culture
- techniques to resolve communication challenges
- methods and techniques to participate in workplace discussions, including active listening, questioning and providing feedback

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- key principles of cross-cultural communication and communication with individuals with special needs or disabilities communication methods suited to audience and workplace requirement:
  - verbal means: telephones, mobile devices, video conference
  - written means: email, SMS, social media
  - Internet of Things (IoT)
- communication challenges relevant to performance evidence:
  - conflicts with clients or team members
  - potential risks or safety hazards
  - unethical or inappropriate communication
- key relevant features of:
  - different communication styles
  - different communication methods
  - relevant cross cultural communication techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXCM401 Apply communication strategies in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to facilitate and apply communication strategies in the workplace within any industry.

This unit has a specific focus on the communication skills required for supervisor level workers with responsibility for other workers.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Prepare for communication	1.1 Identify work activities requiring communication 1.2 Establish communication requirements for identified work activities 1.3 Identify communication roles for self and others to complete activity 1.4 Seek assistance or clarification regarding communication objectives as required 1.5 Select appropriate method of communicating information internally and externally based on

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Elements	Performance Criteria
	organisational requirements
2. Use communication strategies to provide work instruction	2.1 Use appropriate presentation methods to communicate information or instruction based on the requirements of audience 2.2 Use appropriate method of communication to communicate information or instruction based on the requirements of audience 2.3 Negotiate expected work requirements with others and clarify that instructions have been understood
3. Facilitate workplace communication	3.1 Use interpersonal skills to build relationships with team members and clients and facilitate respectful interaction 3.2 Facilitate respectful communication amongst others, considering the needs of those from diverse backgrounds 3.3 Use problem solving and decision making skills to resolve any communication challenges 3.4 Obtain confirmation on outcomes of communication challenges to ensure issues have been resolved
4. Monitor and support team communication	4.1 Ensure all communication is consistent with legislative and organisational requirements 4.2 Provide performance feedback and additional support to others when required 4.3 Seek feedback and assistance from others to improve own communication techniques 4.4 Collate and report any important information and unresolved issues to relevant superiors

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Writing	• Develops written texts using appropriate grammar, spelling and punctuation in relevant organisational formats

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Skill	Description
Navigate the world of work	• Understands responsibilities and complies with legislative, regulatory and organisational requirements
Get the work done	• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement • Uses digital technology to find, record or communicate basic information

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXCM401 Apply communication strategies in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to:

- identify the communication requirements for a work activity and assign roles to others to fulfil those requirements
- select appropriate communication method for relevant audience and according to organisational requirements
- articulate to others their roles in fulfilling the communication requirements and negotiate roles in response to feedback
- present and convey information to others in a way that they can understand and demonstrate that the needs of all recipients, including those from diverse backgrounds have been considered
- demonstrate problem solving techniques to negotiate and resolve communication challenges
- evaluate the communication process and identify areas for improvement, reporting to relevant supervisors as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
  - policies and protocols
  - codes of conduct
  - organisational reputation and culture
- techniques to resolve communication challenges
- methods and techniques to participate in workplace discussions, including active listening, questioning and providing feedback

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- key principles of cross-cultural communication and communication with individuals with special needs or disabilities presentation methods to present and convey workplace information or instructions:
  - formal presentation using visual aids and prompts
  - informal team meeting or instructional briefing
  - written work instruction for a process or procedure
- communication methods suited to audience and workplace requirement:
  - verbal means: telephones, mobiles, video conference
  - written means: emails, SMS, social media
- communication challenges relevant to performance evidence:
  - conflicts with clients or team members
  - potential risks or safety hazards
  - unethical or inappropriate communication
  - use of visual prompts and presentations
  - communication that falls outside of workplace policy
- key relevant features of:
  - different communication styles
  - different communication methods
  - cross cultural communication techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXCM501 Lead communication in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to lead communication in the workplace within any industry.

This unit has a specific focus on the communication skills required for team leaders with responsibility for other workers.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Establish communication protocols	1.1 Analyse internal and external information needs relevant to workplace 1.2 Develop or structure communication protocol(s) to meet organisational information needs and goals 1.3 Identify ways to adapt communication protocols to suit various contexts 1.4 Prepare materials to support and/or implement communication protocols

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2. Coordinate effective communication	2.1 Direct others to communicate according to organisational requirements and goals 2.2 Explain complex information to positively influence others 2.3 Motivate others to communicate respectfully, considering the needs of all, including those from diverse backgrounds 2.4 Identify and address any communication challenges to remove barriers to understanding
3. Present and negotiate persuasively	3.1 Identify and use a variety of communication styles relevant to varying audiences 3.2 Present information in a succinct, clear and persuasive manner 3.3 Evaluate differences in perspective and critically examine outcomes 3.4 Negotiate towards a final outcome with a focus on key outcomes 3.5 Confirm and implement outcomes of negotiation or communication using appropriate methods
4. Review communication practices	4.1 Provide mentoring to others to assist them in achieving communication goals 4.2 Obtain feedback from a variety of sources to manage the outcomes of communications and negotiations 4.3 Identify and document areas for improvement in communication for team or organisational practices 4.4 Implement plans to improve communication processes

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Writing	• Utilises sophisticated writing skills to summarise information from various sources and distinguish significant information from minor references
Navigate the world of work	• Seeks to improve organisational policies and procedures to better meet organisational goals
Get the work done	• Evaluates effectiveness of communication channels, systems and processes to inform decisions and implement improvements • Uses digital technology to find, record or communicate basic

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Skill	Description
	information

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXCM501 Lead communication in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and range of conditions of this unit, including on at least occasion, evidence of the ability to:

- collate research on internal and external communication needs
- develop and implement communication protocols in accordance with organisational requirements
- present information in a persuasive and professional manner
- apply negotiation techniques to reach desired outcomes
- address communication challenges for continuous improvement.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
  - workplace policies
  - codes of conduct
  - organisational reputation and culture
- techniques to resolve communication challenges
- methods to mentor and coach others
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities communication protocols relevant to organisational information needs:
  - internal and external communication guides
  - risk based/emergency communication guides

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  - style/formatting of communication guides
  - processes for allocation of responsibilities for standard communication
- communication challenges relevant to performance evidence:
  - conflicts with clients or team members
  - potential risks or safety hazards
  - unethical or inappropriate communication
  - appropriately framing organisational messaging
- key relevant features of:
  - different communication styles
  - different communication methods
  - relevant cross cultural communication techniques
  - negotiation and conflict resolution techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXCS301 Protect own personal online profile from cyber security threats

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to protect own personal online profile from cyber security threats, and to limit the potential impact of online security breaches.

It applies to those working in a broad range of industries and job roles under some supervision and guidance, who protect their own online profile so that it is cyber secure.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify existing and potential security threats to own personal online profile	1.1 Determine all current online accounts and profiles 1.2 Identify common threats to security of online profiles 1.3 Identify industry-specific risk factors that raise risk levels to own personal profile
2. Audit own personal online profile for identified security threats	2.1 Review all online accounts, associated applications and browsers at risk of identified threats according to organisational policies and procedures 2.2 Review public online profiles that can be linked to own personal identity 2.3 Check billing and account records carefully to detect

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ELEMENT	PERFORMANCE CRITERIA
	early indicators of potential theft 2.4 Report identified suspicious cyber activity according to cyber security legislative requirements and organisational policies and procedures
3. Address identified existing and potential security threats to own personal online profile	3.1 Secure personal online profile and remove potential security risks 3.2 Confirm that software used on own desktop/laptop and mobile devices is current and sufficient 3.3 Remove potentially sensitive personal and company information according to organisational policies and procedures 3.4 Create strong passwords across personal and work accounts 3.5 Turn on two factor authentication across all accounts where available 3.6 Adjust privacy/security settings on internet browser, web applications and applicable online accounts 3.7 Delete all unused online accounts/applications according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security
Technology	• Uses appropriate technology platforms to assist with protecting online profile from cyber security threats
Problem solving	• Uses problem solving skills to understand the nature of potential threat to personal profile or device and to undertake required action

Unit Mapping Information

No equivalent unit. New unit.

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Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS301 Protect own personal online profile from cyber security threats

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- conduct one audit of own personal online profile and identify existing and potential cyber security threats
- identify and address three potential cyber security risks to own personal online profile.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to reporting cyber security threats
- organisational policies and procedures relating to online profiles, including escalation routes for cyber security issues
- basic principles of cyber security, including:
  - importance of data confidentiality, integrity and availability
  - common cyber security terms
  - common cyber security threats that individuals might be exposed to online
  - secure internet browsing
- risk factors relating to own personal online profile, including:
  - password management practices:
    - strength of created passwords
    - number of passwords used for multiple accounts
    - frequency of change to passwords
  - own work role within organisation
  - regular tasks in own work that raise personal risk level, including internet browsing
  - potential targets for cyber attack in own direct professional network
  - protocols for handling personally identifiable information

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    - physical safety of devices
- industry-specific risk factors and their risk to online profiles
- common strategies, tools and techniques for improving security of own personal online profile, including for:
    - password protection
    - secure password management and account replicating and splitting
    - fundamentals of two-factor authentication
    - billing and account privacy settings
    - software patching
    - connecting to public Wi-Fi via virtual private networks (VPNs)
- common methods and practices for:
    - responding to cyber security issues, including reporting protocols
    - secure internet browsing, including banking and email
- common cyber security threats that individuals and data might be exposed to, including:
    - phishing
    - social engineering
    - social media
    - malware
    - physical threats, including data loss due to working insecurely in public spaces.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXCS302 Identify and report online security threats

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to identify and report online security threats to limit potential impact of cyber security breaches.

It applies to those working in a broad range of industries and job roles under some supervision and guidance who encounter and report online threats during the course of their work.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify online security threats	1.1 Review internal policies, procedures and plans relating potential online security breaches 1.2 Identify features of common types of potentially fraudulent communications 1.3 Implement techniques to verify suspicious requests for information
2. Respond to an online security breach	2.1 Block and report potential security breaches on computer and mobile device according to organisational policies and procedures 2.2 Respond to actual security breach or cyber security incident according to organisational response plan 2.3 Report security breach or cyber security incident according to

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ELEMENT	PERFORMANCE CRITERIA
	legislative requirements and organisational policies and procedures
3. Support post- breach review	3.1 Provide information to required personnel to assist in documenting potential and actual breaches 3.2 Support post-incident review and identifying lessons learnt 3.3 Contribute updates to cyber security incident response plan as required and within scope of own role

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Oral communication	• Asks open and closed probing questions and actively listens to ensure that concepts regarding cyber security are well understood
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security
Writing	• Uses clear, specific and industry-related terminology relating to cyber security for breach and incident reports
Technology	• Uses appropriate technology platforms to share information within the organisation relating to potential online security threats

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS302 Identify and report online security threats

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and report three different online security threats in a work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to identifying and reporting online security threats, including:
  - data protection
  - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
  - established international legislation
- organisational policies and procedures relating to online information security breaches, including:
  - blocking and reporting potential security breaches
  - escalation routes for cyber security issues
- common types of online scams and security risks, including phishing scams
- common techniques of phishing and spear phishing used by attackers, including:
  - spam email and SMS text
  - social engineering, including telephone calls, social media and website requests for information
- basic principles of cyber security
- indicators of insecure connection to websites, in particular where data is being collected
- Australian government sources of information on current online security threats
- common online security threats to which individuals might be exposed to, including physical threats

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- common procedures for:
  - mitigating online security threats
  - following organisational cyber security incident response plan
  - responding to cyber security breaches.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXCS303 Securely manage personally identifiable information and workplace information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to securely manage personally identifiable information (PII) and workplace information.

It applies to those working in a broad range of industries and job roles under some supervision and guidance who manage large amounts of PII and workplace information.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Handle PII and workplace information responsibly	1.1 Review current standards, practices and procedures relating to workplace information 1.2 Identify sensitive data in own workplace environment according to organisational policies and procedures and within scope of own role 1.3 Classify workplace information types according to organisational procedures 1.4 Apply privacy policies to all data devices that require confidentiality
2. Store and share PII and workplace information	2.1 Organise obtained data sets in an easily retrievable format 2.2 Implement required access control protocols for identified

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ELEMENT	PERFORMANCE CRITERIA
securely	sensitive data 2.3 Confirm that data is accurate, up-to-date, and comprehensive 2.4 Identify and report malfunctioning infrastructure and attacks on infrastructure that pose a threat to data integrity
3. Apply information protection protocols	3.1 Conduct back-up of on-site and off-site data according to organisational policies and procedures 3.2 Conduct privacy impact assessments on data 3.3 Confirm adherence to data protection compliance standards

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets mathematical data
Oral communication	• Asks open and closed probing questions and actively listens to clarify consultations
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Planning and organising	• Efficiently and logically sequence the stages of data management
Technology	• Uses appropriate technology platforms to assist with data storage, data retrieval and data management

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS303 Securely manage personally identifiable information and workplace information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use data protection techniques to manage workplace information for one work area over the life of a small project or work cycle.

In the course of the above, the candidate must store and share personally identifiable information (PII) in a secure manner.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to securely managing PII and workplace information, including:
  - data protection
  - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
  - established international legislation
- organisational policies and procedures relating to:
  - identifying sensitive data
  - securely storing, sharing and managing customer information
  - encryption, and protocols for its uses
  - data classification
  - media and document labelling
  - monitoring and reporting faults and malfunctions in IT infrastructure
- industry best practice and Australian government sources of information relating to access control, including:

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  - password protection
  - storage locations
  - securely sharing
  - data deletion
- risks and benefits of cloud storage
- risks of communicating sensitive information via non-secure means e.g. email and SMS
- framework for distributed storage
- technologies, techniques and protocols for storing and retrieving data
- data protection protocols and industry-standard compliance standards relating to:
  - back-up
  - data sharing
  - data storage
  - disposal of sensitive information
  - privacy impact assessments.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXCS401 Maintain security of digital devices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required ensure the cyber security of digital devices.

It applies to those working in a broad range of industries who as part of their job role ensure the security of digital devices used.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify appropriate security for digital devices	1.1 Create and maintain register of digital devices on organisation's network 1.2 Confirm what information is held on the registered devices 1.3 Categorise level of risk associated with each device based on sensitivity of information stored 1.4 Select required security protocol to manage level of risk associated with each device
2. Apply protection strategies to digital devices	2.1 Install and run latest anti-malware on each device 2.2 Create strong passwords across personal and work accounts 2.3 Switch on two-factor authentication where available

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ELEMENT	PERFORMANCE CRITERIA
	2.4 Encrypt devices according to instructions 2.5 Develop associated physical security plan and communicate this to whole organisation
3. Evaluate effectiveness of applied protection strategies	3.1 Review number of breaches and business impact over review period 3.2 Monitor latest developments in digital security 3.3 Support organisation to select most appropriate security strategies
4. Patch software across multiple devices	4.1 Apply updates to software and applications across own desktop and mobile devices 4.2 Ensure that new devices are updated and configured correctly as part of initial start-up procedure

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets mathematical data • Completes at times complex calculations and records mathematical data
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security
Technology	• Uses appropriate technology platforms to assist with protection strategies relating to cyber security

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS401 Maintain security of digital devices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use best practice protection strategies to maintain the security of two different electronic devices over the life of a small project or work cycle
- conduct gap analysis to evaluate effectiveness of all applied best practice strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- external party security risks and methods for mitigating risk
- industry-accepted best practice protection strategies for improving security on digital devices:
  - password management
  - use of anti-virus software
  - virtual private network (VPN) use on public Wi-Fi
  - router settings
  - fundamentals of two-factor authentication
  - encryption
  - patching software applications
- risk management methodologies
- tools and techniques to conduct gap analysis of strategy performance
- data protection requirements for:
  - stored data
  - data in transit
  - data in third party applications
- mobile device security strategies.

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Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXCS402 Promote workplace cyber security awareness and best practices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to promote cyber security in a work area.

It applies to those working in a broad range of industries who as part of their job role support policies, procedures and practice within an organisation that promote cyber security.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop cyber security awareness in work area	1.1 Establish current level of awareness in work area relating to cyber security 1.2 Create and maintain cyber security awareness program that reflects organisation-wide best practice 1.3 Contribute to developing cyber security policies and procedures, and communicate to required personnel
2. Support effective cyber security practices in work area	2.1 Review cyber security practices according to organisational policies and procedures 2.2 Arrange training and information updates as required, and maintain related records 2.3 Present insights from review and training to required

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ELEMENT	PERFORMANCE CRITERIA
	personnel, and potential related impacts on workplace
3. Review cyber security awareness in work area	3.1 Review latest cyber security threats and trends impacting organisations 3.2 Document outcomes of review and suggested improvements for consideration by required personnel 3.3 Communicate review outcomes and cyber security improvement requirements according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information • Shares insights gained from cyber security trend analysis
Oral communication	• Consults with stakeholders to inform decision making
Reading	• Interprets information from relevant sources to determine organisational expectations
Writing	• Uses clear, specific and industry-related terminology relating to cyber security in workplace documents
Planning and organising	• Maintains records and documentation relating to cyber security protection
Teamwork	• Works collaboratively with interdisciplinary teams to promote cyber security
Technology	• Uses appropriate technology platforms to assist with promoting cyber security within work area

Unit Mapping Information

No equivalent unit. New unit.

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Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS402 Promote workplace cyber security awareness and best practices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop one set of policies and procedures for a work area that promote cyber security awareness and practices
- arrange training or updates to be provided to colleagues that support practice or awareness in relation to two different cyber security matters.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to cyber security context of performance evidence, including:
  - data protection
  - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
  - established international legislation
- organisational policies and procedures relating to:
  - securely storing, sharing and managing information
  - encryption, and protocols for its uses
  - data classification and management
  - media/document labelling
  - data governance
  - acceptable use
  - bring your own device
- Australian government sources of information on current threats
- risks associated with workplace cyber security
- strategies and techniques for promoting workplace cyber security

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- techniques for:
  - implementing and promoting workplace cyber security awareness
  - facilitating training that promotes cyber security awareness, including the use of simulated activities.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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BSBXCS403 Contribute to cyber security threat assessments

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to support maintaining a cyber secure network through identifying cyber security threats for an organisation.

It applies to those working in a broad range of industries who as part of their job role contribute to assessments of level of risk relating to real and potential cyber security breaches.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to reviewing workplace cyber security threats	1.1 Identify relevant organisational data security/protection policies and procedures 1.2 Contribute to organisation-wide cyber security audits 1.3 Contribute to identifying threats to workplace security of cyber security threats
2. Assist in assessing risks and potential business impact of cyber security threats	2.1 Assist in assessing cyber security risks and their likelihood, consequences and suggested mitigation strategies 2.2 Assist in reviewing industry level threats and best practice cyber security strategies 2.3 Assign risk levels for identified cyber risks based

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ELEMENT	PERFORMANCE CRITERIA
	on measurement scale 2.4 Contribute to identifying impact of risks
3. Finalise cyber security threat assessment	3.1 Document impact findings that include recommendations for required responses to control risks 3.2 Support the communication of cyber security threat assessment outcomes and recommendations to required personnel 3.3 Seek feedback as required on assessment findings 3.4 Assist in integrating feedback to finalise threat assessment 3.5 Distribute or store final threat assessment according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets mathematical data • Completes at times complex calculations and records mathematical data
Oral communication	• Asks open and closed probing questions and actively listens to clarify consultations • Communicate findings of assessment of business impact to required personnel
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations
Writing	• Uses clear, specific and industry-related terminology relating to cyber security • Produces written reports on business impact of assessed threat
Teamwork	• Works collaboratively with interdisciplinary teams to ensure procedures are implemented
Technology	• Uses appropriate technology platforms to assist with cyber security threat assessments

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Unit Mapping Information

No equivalent unit. New unit.

Links

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Assessment Requirements for BSBXCS403 Contribute to cyber security threat assessments

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- provide non-technical support to a cyber security threat assessment in a work area by describing three threats
- communicate and distribute findings of the identified threats.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to contributing to cyber security threat assessments, including:
  - data protection
  - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
  - established international legislation
- potential organisational impact of cyber attacks
- online risks affecting organisation’s operations
- common procedures for cyber threat rating and modelling
- strategies, techniques and tools that improve an organisation’s cyber security and audit processes
- organisational policies and procedures for information security, including:
  - confidentiality, integrity, and availability
  - communicating threat assessment findings.

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Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBXCS404 Contribute to cyber security risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to contribute to cyber security risk management, which includes assisting in developing and managing associated risk management strategies.

It applies to those working in a broad range of industries and job roles who work alongside technical experts to develop cyber security risk-management strategies.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Contribute to recommending risk management strategies that mitigate cyber security risk	1.1 Consult with stakeholders to determine scope of risk management appropriate to organisation and industry 1.2 Review relevant critical cyber risk management strategies appropriate to level of risk 1.3 Assist in developing suitable cyber security response options according to organisational policies and procedures 1.4 Present options for risk management strategies for approval within scope of own role 1.5 Document approved risk management strategies

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ELEMENT	PERFORMANCE CRITERIA
2. Support implementation of approved risk management strategies in response to risk	2.1 Support communication of approved risk management strategies to required personnel 2.2 Contribute to monitoring cyber security risk according to selected risk management strategies 2.3 Assist in determining compliance with implemented cyber risk mitigation strategies 2.4 Address non-compliance within scope of own role and escalate where required according to organisational policies and procedures 2.5 Assist in establishing feedback processes that provide warning of potential new risks according to organisational requirements
3. Review and revise implemented risk management strategies	3.1 Identify benchmarks to track effectiveness of risk management strategies 3.2 Support evaluation of effectiveness of implemented strategies 3.3 Update risk management strategies with new information as required

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information
Numeracy	• Interprets mathematical data
Oral communication	• Asks open and closed probing questions and actively listens to clarify consultations • Communicate proposed risk management strategies to required personnel
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Writing	• Uses clear, specific and industry-related terminology relating to cyber security • Maintains and updates a range of documents, including risk registers and incident response plans
Planning and	• Manages incident response plans

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Skill	Description
organising	
Teamwork	• Works collaboratively with interdisciplinary teams develop cyber risk management strategies
Technology	• Uses appropriate technology platforms to assist with cyber security risk management

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS404 Contribute to cyber security risk management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to developing and implementing risk management strategies that control two different identified cyber security risks and document the response option applied to each risk
- support evaluation of effectiveness of each implemented strategy.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory requirements relating to contributing to cyber security risk management, including:
  - data protection legislation
  - notifiable data breach legislation
  - Australian privacy laws
  - established international legislation
- key risk management strategies, including:
  - regular organisational training
  - regular threat assessment
  - cyber security incident response plan
  - clear escalation routes
- organisational policies and procedures, including for:
  - analysing and reviewing risk management methodologies
  - developing communications plans
  - evaluating effectiveness of risk management strategies
  - monitoring cyber risk

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  - reviewing currency of risk register
- industry-specific knowledge of suitable procedures for applying risk management strategy
- guidelines required for updating technology
- business process design principles in relation to risk management
- reporting mechanisms for tracking organisational cyber security maturity.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBXCS405 Contribute to cyber security incident responses

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Application

This unit describes the skills and knowledge required to assist in responding to and containing cyber security incidents.

It applies to those working in a broad range of industries and job roles who work alongside technical experts to develop cyber security risk-management strategies.

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

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Confirm cyber security incident and contribute to its containment	1.1 Confirm nature and location of cyber security incident according to organisational policies and procedures 1.2 Estimate risk, likelihood and potential consequence of incident according to organisational response procedures 1.3 Assist in ensuring that cyber incident is contained according to legislative requirements and organisational cyber security incident response plan 1.4 Assist in confirming no further risks according to legislative requirements and organisational response procedures
2. Communicate information on cyber security incident	2.1 Escalate cyber security incident with required workplace personnel according to organisational policies and

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ELEMENT	PERFORMANCE CRITERIA
	procedures 2.2 Consult with required internal and external stakeholders on communication needs relating to cyber security incident 2.3 Assist in alerting required external parties according to legislative requirements and organisational procedures
3. Contribute to post-incident activities	3.1 Support post-breach review and reporting 3.2 Assist in identifying lessons learnt from incident response and recommended changes to cyber security response plan 3.3 Assist in updating cyber security response plan to reflect review outcomes according to organisational policies and procedures 3.4 Communicate lessons learnt and recommendations to required personnel

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Modifies behaviour following exposure to new information • Understands developments within cyber security protection and is able to advise on which options are appropriate
Numeracy	• Interprets mathematical data • Completes at times complex calculations and records mathematical data
Oral communication	• Asks open and closed probe questions and actively listens to clarify consult with business and ICT technicians • Communicate findings of assessment of business impact to required personnel
Reading	• Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements
Writing	• Uses clear, specific and industry-related terminology relating to cyber security • Produce written reports on business impact of assessed threat
Planning and organising	• Manages cyber security incident response plan including protection strategies through to responding to breaches

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Skill	Description
Technology	• Uses appropriate technology platforms to assist with cyber security incident responses

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for BSBXCS405 Contribute to cyber security incident responses

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package 6.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to assist in:

- responding to two different cyber security incidents in a work area
- conducting one post-breach review.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to contributing to cyber security incident responses, including:
  - data protection
  - implications of notifiable data breach legislation on an organisation and other associated Australian privacy laws
  - established international legislation
- procedures for developing communications plans
- organisational policies and procedures relating to cyber security incident response, including procedures for:
  - confirming nature and location of incidents
  - determining risk, likelihood, and consequence of incidents
  - containing incidents
  - notifying internal and external stakeholders of incident
  - internal and external communications
  - conducting post-breach reviews
- reporting methods for cyber security incidents, including official government channels
- key features of cyber security incident response plan
- risk mitigation strategies and procedures relating to cyber security

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- internal and external stakeholders involved in responding to cyber security incidents.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to appropriately respond to the individual needs of customers or clients with disability, to maximise equal access to provided products or services.

This unit applies to front line personnel in service providers who interact with customers or clients with disabilities. Those undertaking this unit would work autonomously in a range of contexts whilst performing specific tasks, with supervisors available as an escalation point, if required.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Determine service requirements for customer or client with disability	1.1 Confirm that communication method and form of interaction meet the capabilities, needs and preferences of individual customers or clients 1.2 Communicate with customer or client to determine the reason for the service interaction

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	1.3 Consult customers or clients to confirm if they have a requirement or preference for additional personal support within the service context
2. Confirm whether customer or client needs can be met through service provided	2.1 Determine whether customer or clients' service and support needs are within the scope of own role and responsibilities, and confirm with supervisor 2.2 Identify where reference to other service providers is required where customer or client support needs or preferences are beyond the scope of own role
3. Provide service to customers or clients with disability	3.1 Inform customers or clients about the products, services or supports that are accessible to them, and how they can be used or navigated 3.2 Identify and access available supports, facilities or resources within scope of own role and according to organisational procedures, as required to service individual customers or clients 3.3 Seek feedback on whether customers or clients are satisfied with the service received and that their service needs have been addressed

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Reading	• Accesses, reads and interprets information related to resources and supports available
Communication	• Discusses and seeks information using appropriate structure and language for the particular audience • Exchanges information through questions and responses to clarify or confirm understanding • Engages with others clearly, using appropriate language and pace suitable to audience and environment
Navigate the world of work	• Complies with organisational protocols, policies and procedures relevant to own role • Understands nature and purpose of own role and associated responsibilities and how it contributed to organisational goals and outcomes

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Skill	Description
Interact with others	• Selects and uses appropriate communication techniques in response to differences in customer or client profile • Establishes connections and shares information with others who can contribute to effective work outcomes
Get the work done	• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to:

- interact with a minimum of three different individual customers or clients with disability in compliance with organisational diversity and inclusion objectives and policies, codes of practice and behavioural guidelines and:
  - adjust communication styles within the service context, using verbal and nonverbal techniques to accommodate the individual capabilities, needs and preferences of customers or clients
  - interact through the use of assistive communication devices as directed by individual customers, support persons or specialist support providers
  - implement a person-centred service approach that focuses on individual customer or clients' expressions of their needs and preferences
  - provide support and access resources and services to address the needs of customers or clients within scope of own role and escalate to supervisor where required
  - refer to additional service providers to meet more complex individual customer or client needs
  - seek feedback on customer/client satisfaction with service.

Throughout this process, interaction with an individual's support person should only be undertaken as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational policies, codes of practice and/or behavioural guidelines for:
  - interacting with customers or clients with disability
  - maintaining confidentiality, privacy and dignity for customers and clients

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    - responding to customers and clients disclosing and/or sharing information about disability
- persons covered by the Disability Discrimination Act
- features of the social model of disability as compared to the medical model
- where barriers to access and communication within service contexts exist
- different communication methods and techniques that can be employed when interacting with customers or clients, including:
    - use of plain English in spoken and written communication
    - at least one other verbal and one other nonverbal communication method
    - at least two augmentative and alternative communication techniques appropriate to the service context and purpose of interaction
- inclusive language and person-first expressions to use when communicating with, or about, customers or clients with disability
- supports, services, resources, facilities and aids that can be accessed and utilised to meet individual customer or client needs
- principles and strategies of a person centred support approach
- additional disability support and service providers that can be referred to, to meet more complex individual customer or client needs.

Assessment Conditions

The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- a customer or client base or a simulated setting (where a workplace situation would be impractical, inappropriate or not possible), consisting of contact with a minimum of three individuals with differing disabilities
- workplace diversity and service policies and codes of practice
- organisational guidelines and codes of practice for provision of service to customers or clients with disability
- organisational products, services and/or supports

Industry operating conditions, including:

- challenges typical in work to support customers or clients with disability
- a minimum of three opportunities for real service interactions with customers or clients, either face to face or through other formats for service interaction, such as telephone and email.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards to AC.

Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to develop and implement recruitment processes in accordance with regulatory and workplace requirements, to ensure a workforce that is inclusive of people with disability. It involves developing capabilities to ensure hiring processes are accessible to candidates with differing disabilities, and that hiring outcomes promote workplace inclusion and diversity objectives.

This unit applies to human resources staff and hiring managers, as well as broader management within workplaces across various industries, who are responsible for determining hiring requirements, structuring jobs and assessing applicants.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Determine job requirements	1.1 Consult with relevant management personnel to determine workplace recruitment needs and position requirements 1.2 Prepare job descriptions, capability and task specifications that

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	accurately reflect inherent role requirements and workplace needs 1.3 Develop selection criteria that reflect job specifications and support opportunities for candidates with disability
2. Establish accessible application processes	2.1 Choose alternative formats, channels and technologies for advertising vacancies that promote applications from talent pools including people with disability 2.2 Test accessibility of application processes and platforms to ensure all candidates are able to submit applications
3. Undertake inclusive interview processes	3.1 Design an interview guide and questions that can be presented in various formats, which reflect job role requirements and anti-discrimination standards 3.2 Confirm the format, method of communication and environment through which interview will be undertaken, and outline alternative options to assist with meeting individual applicant needs and preferences 3.3 Consult applicants on their individual communication and support needs, and identify any modifications, reasonable adjustments or alternative communication strategies to be implemented to assist them through the hiring process 3.4 Conduct accessible interviews, through formats and techniques that match identified applicant needs 3.5 Test the accessibility of any other assessment and selection tools used, and confirm that candidates are able to use them, or have available alternatives, to demonstrate their skills and capabilities
4. Conclude recruitment process	4.1 Assess and select candidates equitably and objectively using selection criteria 4.2 Seek feedback from applicants on accessibility of recruitment process and implementation of any adjustments 4.3 Seek feedback from manager of successful candidate on appropriateness of match to job specifications, to inform improvements for future recruitment processes 4.4 Make recommendations to management responsible for workplace policies and practices to improve inclusive recruitment of people with disability

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Analyses and evaluates a range of textual information to determine staff requirements of the workplace, and suitability of candidates
Writing	• Researches and develops documents that communicate effectively, maximising the potential to attract suitable candidates, and developed within applicable organisational and legislative requirements • Creates texts using formats and language appropriate to the audience and context
Communication	• Presents information and seeks advice using appropriate structure and language for the particular audience • Participates in discussions using questions and responses to elicit the view of others and to clarify or confirm understanding
Navigate the world of work	• Recognises and adheres to legislative requirements, workplace protocols, policies and procedures associated with the hiring process • Develops and reviews workplace policies and procedures in accordance with legal and workplace requirements
Interact with others	• Uses inclusive and collaborative techniques to seek feedback and support, and consult with a range of stakeholders • Selects and uses appropriate protocols when communicating with internal stakeholders, as well as candidates, to seek or share information
Get the work done	• Plans and organises workload, information and hiring that ensures compliance with workplace policies, procedures and legislative requirements • Uses problem-solving skills to identify and analyse issues, consider options and develop responses and opportunities for improvement • Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes

Unit Mapping Information

No equivalent unit. New unit.

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Links

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

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

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to conduct the following on at least one occasion:

- undertake a recruitment process on at least one occasion that includes 2 or more candidates, including:
  - identifying current legislative obligations that must be adhered to when recruiting
  - identifying and recommending any improvements to support workplace diversity and inclusion when recruiting
  - preparing a job description relevant to a workplace hiring need, including:
    - outlining inherent role requirements, task, skill and knowledge specifications
    - removing any exclusionary criteria that are not inherent to core role requirements
  - developing selection criteria that match the job requirements as well as support opportunities for candidates with disability
  - accessing employment agencies and/or specialist services to source candidates and confirm access requirements for recruitment processes, applications and interviews
  - selecting and using accessible communication channels, formats and technologies for promoting vacancies and accepting applications
  - developing non-discriminatory interview guides that match selection criteria
  - confirming the accessibility of any other assessment techniques or tools used
  - conducting recruitment and interviewing processes by:
    - consulting candidates to determine their communication and support needs
    - outlining any modifications required to assist them through the hiring process
    - selecting and using appropriate communication techniques, interview formats and environments, technologies or adjustments to meet individual candidate needs
    - involving any support persons as necessary and ensuring that they do not detract from the first hand interaction with the candidate (for example, by answering questions for the individual beyond a translation capacity)

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- assessing candidates against selection criteria, make selections and justify choice
- seeking feedback on hiring processes from applicants and management.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- persons covered by the Disability Discrimination Act
- the social model of disability as compared to the medical model
- current legislation, standards and other instruments that promote the inclusion and rights of people with disability, including:
  - Disability Discrimination Act
  - Fair Work Act
  - Other State/Territory anti-discrimination legislation
  - United Nations Convention on the Rights of Persons with Disabilities
  - The National Disability Strategy
  - Accessibility standards, including the Web Content Accessibility Guidelines
- workplace responsibilities related to inclusive recruitment processes
- positive workplace outcomes resulting from the hiring of individuals with disability
- aspects of workplace operations that impact the outcomes of inclusive recruitment strategies, including:
  - staffing structure and workforce needs
  - workplace human resource and hiring practices
  - job needs, knowledge and skill requirements, and inherent role requirements
  - workplace diversity and inclusion objectives and policies
- workplace policies and protocols for:
  - recruitment and inclusion of people with disability
  - maintaining confidentiality and privacy for job applicants and staff members
  - responding to disclosure and/or sharing of information about disability
- inclusive language and person-first expressions to use when communicating with, or about, people with disability
- accessible and inclusive options for aspects of recruitment processes, including:
  - candidate sourcing methods
  - assessment techniques and tools
  - interview formats, environments and techniques
  - language and questioning strategies
- appropriate communication techniques, including use of plain English, and augmentative and alternative communication methods and aids
- disability employment services, other employment agencies or specialist services that can provide advice on accessible recruitment processes and assist with accessing talent pools.
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Assessment Conditions

Skills must have been demonstrated in a real or simulated workplace. Simulations and scenarios are to be used where assessment in a workplace situation would be impractical, inappropriate, or not possible, particularly where skills relate to more sensitive or critical instances. The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- access to details regarding the workplace recruitment need
- legislation and workplace policies related to diversity, inclusion and recruitment
- communication channels, assessment tools, and workplace technologies
- applicants with disability or case studies of applicants with disability

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXDB501 Support staff members with disability in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to support staff members with disability and address their workplace related needs. It involves coordinating additional support on an individualised level, to ensure that staff members are able to perform to the full extent of their capabilities with minimal barriers to work.

This unit applies to managers in organisations in various industries, who oversee other staff members.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Promote additional support to staff members	1.1 Implement workplace initiatives that promote and encourage staff members to disclose and/or share information about their disability or support needs 1.2 Inform staff members of the supports and adjustments available to them, the benefits of requesting support, and the processes through which they can discuss additional support

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	needs
2. Plan to address additional support needs for staff members with disability	2.1 Consult staff members who have self-identified, to discuss their work abilities, challenges and additional needs 2.2 Establish goals and expectations for provision of additional support with individual staff members 2.3 Agree with staff members on additional supports and strategies to implement, including any reasonable adjustments, to address their additional needs
3. Implement additional support for staff members with disability	3.1 Make necessary workplace arrangements to implement additional support and/or reasonable adjustment for individual staff members 3.2 Refer to additional support providers and specialists, where required support is beyond the scope of own role 3.3 Advise other relevant staff of their role in providing additional support to individual staff members 3.4 Review and seek feedback from staff members on implementation of strategies and supports 3.5 Make changes to strategies and supports in line with staff members' feedback and preferences

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Reading	• Accesses, reads and interprets detailed information related to resources and supports available
Writing	• Develops and maintains workplace documentation accurately and in response to required needs
Communication	• Discusses and seeks information using appropriate structure and language for the particular audience • Uses questions and responses to clarify or confirm understanding • Uses appropriate communication techniques to build rapport, trust and provide guidance and feedback
Navigate the world of work	• Recognises and follows legislative requirements, organisational protocols, policies and procedures relevant to own role

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Interact with others	• Cooperates and consults with others to clarify understanding, achieve joint outcomes and seek feedback
Get the work done	• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement • Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXDB501 Support staff members with disability in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including, on at least one occasion, evidence of the ability to:

- communicate the supports available to staff members and encourage staff members to disclose disabilities and/or discuss additional support needs
- collaborate and consult with a minimum of three individual staff members with disability to:
  - identify work challenges and additional support needs
  - determine preferences for individual support
  - agree and document strategies, supports, reasonable adjustments and/or resources to implement to address support needs in line with organisational procedures
  - monitor effectiveness of supports and strategies and make any improvements as required to ensure additional support needs are met
  - involve any support persons as required throughout the process
- implement workplace arrangements and/or adjustments to fulfil provision of agreed additional support
- communicate roles and responsibilities related to support arrangements to other relevant staff
- refer to additional or specialist support providers to address support needs outside of scope of own role.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- current legislation, standards and other instruments that promote the needs and rights of people with disability, including:
  - Disability Discrimination Act
  - Disability Services Act

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  - Fair Work Act
  - Other State/Territory anti-discrimination legislation
  - United Nations Convention on the Rights of Persons with Disabilities
  - The National Disability Strategy
- organisation protocols, policies and procedures for:
  - implementing modifications or supports for staff members
  - maintaining confidentiality, privacy and dignity for staff members
- the definition of 'reasonable adjustment' within the organisational context, taking note of the organisation's size, capabilities and resource base
- support strategies, resources and reasonable adjustments that can be implemented to meet staff member support needs, including:
  - workplace modifications, equipment and facilities
  - assistive technologies, devices and aids
  - augmentative and alternative communication methods
  - use of plain English
  - flexible work options
  - cognitive and work tools
  - support services and specialist support providers
  - Government agencies and funds that provide services and support to people with disability and their employers
- anonymous and identifying processes for staff members to learn about available supports and discuss support needs, including:
  - online resources
  - hotlines
  - workplace support teams
  - one-on-one conversations
- inclusive language and person-first expressions to use when communicating with, or about, staff members with disability.
-

Assessment Conditions

The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- a work team, or workplace case study, consisting of minimum five staff members, where at least three have a disability
- relevant legislation and workplace documents that address workplace inclusion and diversity practices and responsibilities, provision of workplace adjustment or additional support
- workplace disability and support policies and codes of practice

Industry or simulated operating conditions, including:

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- challenges typical in work with staff members with disability and additional support needs
- scenarios or opportunities that require real-time, interpersonal interactions and problem solving with other staff members and support providers

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to identify access requirements and barriers for people with different types of disability within organisational design, environments, and processes. It involves planning processes of organisational change to ensure people with disability experience equal access and inclusion within an organisational setting.

This unit applies to organisational managers and leaders across various industries with administrative responsibilities. Their roles and responsibilities would include planning, changing and evaluating organisational environments, processes, facilities and resources to enhance accessibility for people with disability.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	Performance Criteria Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Determine current accessibility of an organisation	1.1 Assess current organisational compliance with accessibility legislation and standards 1.2 Identify current barriers to access within environmental

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	and operational aspects of an organisation
2. Identify how barriers to access can be addressed	2.1 Identify access solutions to address identified organisational access barriers 2.2 Seek feedback from internal and external stakeholders to confirm viability of proposed access solutions 2.3 Outline accessibility changes to be made to the environmental and operational aspects of an organisation
3. Implement accessibility improvements	3.1 Develop plan to implement changes within scope of own role 3.2 Communicate changes and ongoing access responsibilities to members of the organisation whose roles are impacted 3.3 Seek approval from management for accessibility changes outside the limits of own role
4. Evaluate accessibility plan and update as required	4.1 Evaluate accessibility plan against identified goals, consulting internal and external stakeholders as required 4.2 Document and implement any further improvements to be made to ensure organisational accessibility

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Learning	• Undertakes research activities to understand access needs and obligations
Reading	• Sources, analyses and interprets detailed information related to access needs and organisational obligations
Writing	• Structures content and documents in a logical, detailed and accurate manner which incorporates recommendations
Navigate the world of work	• Identifies, confirms and takes responsibility for adherence to legal and ethical requirements, organisational policies and procedures relevant to own role
Interact with	• Uses inclusive and collaborative techniques to seek feedback, negotiate and consult with a range of stakeholders

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others	
Get the work done	• Uses systematic and analytical processes to gather information and identify and evaluate options against criteria • Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement • Organises and completes work according to defined requirements, taking responsibility for decisions, planning and implementing activities, and sequencing tasks to achieve efficient outcomes

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including, on at least one occasion, evidence of the ability to:

- determine organisational obligations under current accessibility and anti-discrimination legislation, and standards
- determine to what extent an organisation is currently meeting compliance requirements
- analyse and confirm requirements for access and use for people with differing disabilities, specific to the organisational context
- outline barriers to access that must be addressed within an organisation
- apply the Principles of Universal Design to the environmental and operational aspects of an organisation
- develop practical solutions that effectively address identified opportunities to improve accessibility, leveraging research findings and technological developments where appropriate
- consult with internal and external stakeholders, such as customers, colleagues or access experts, as required to test solutions, confirm suitability, and develop implementation plan for changes
- review and update implementation plan as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- current access and anti-discrimination legislation and standards, including:
  - Disability Discrimination Act
  - State and Territory anti-discrimination legislation
  - United Nations Convention on the Rights of Persons with Disabilities
  - Disability Services Act
  - National Disability Strategy

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    - The Web Content Accessibility Guidelines
- accessibility compliance requirements for organisations
- persons covered by the Disability Discrimination Act and associated accessibility requirements
- features of the social model of disability as compared to the medical model
- where barriers to access and inclusion exist within the organisational environment
- typical barriers to access within an organisation, including:
    - premises and facilities
    - environmental and sensory factors
    - organisational information resources
    - communication systems and contact points
    - organisational processes
    - operating systems
    - technological platforms
    - organisational culture and behaviours
- Principles of Universal Design
- tools and tests that can be utilised to test the accessibility of websites and other online content or digital platforms
- different communication techniques and methods of presenting information, including:
    - alternative and augmentative communication strategies
    - use of plain English
- assistive technologies, design developments and solutions that can help address access needs
- access experts and resources that can assist with addressing accessibility requirements.

Assessment Conditions

Skills must have been demonstrated in the workplace. The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- access to details regarding the environmental and operational aspects of the organisation
- legislation, standards and organisational policies relevant to accessibility and inclusion
- internal or external organisational stakeholders to consult regarding access solutions
- information regarding the impact and outcomes of implemented accessibility changes
- opportunities for consultation or collaboration with real accessibility stakeholders, to support the implementation of access improvements.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

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BSBXTW301 Work in a team

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to work effectively as part of permanent or project based teams in a workplace within an industry.

This unit applies to a wide range of workers, but has a specific focus on the teamwork skills required for workers with limited responsibility for others.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Identify individual work tasks within a team	1.1 Identify own responsibilities according to organisational policies and procedures 1.2 Identify own role and task requirements within team 1.3 Articulate team structure and roles of other team members 1.4 Plan and prioritise own tasks according to given time frames and

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	team requirements
2. Contribute effectively to team goals	2.1 Identify team goals and own responsibilities relevant to achieving team goals 2.2 Contribute ideas and information in team planning discussions 2.3 Share knowledge and skills with team members to enable effective teamwork and seek or offer support as required
3. Work effectively with team members	3.1 Communicate clearly and respectfully with team members, considering the needs of those from diverse backgrounds and roles 3.2 Collaborate effectively with team members, including those who are working remotely on workplace issues 3.3 Seek and provide assistance and feedback to team members where appropriate
4. Communicate effectively with team leaders	4.1 Receive and confirm understanding of task instructions or directions 4.2 Communicate personal commitments in a timely manner 4.3 Identify and report any issues preventing the completion of workplace tasks, according to organisational requirements 4.4 Seek and act upon feedback to improve personal performance and/or behaviour

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	**Description**
Interact with others	• Uses appropriate communication practices when communicating with others • Cooperates and collaborates with team members
Get the work done	• Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaboration, seeking assistance in setting priorities • Uses digital technology to find, record or communicate information

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Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXTW301 Work in a team

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- identify individual and team roles and responsibilities
- plan assigned tasks according to priorities and deadlines, and in accordance with organisational requirements
- contribute to achievement of team goals
- share knowledge, ideas and problems with team members
- act on feedback in a constructive manner
- collaborate with a remote team member on a workplace issue.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational requirements relevant to working in a workplace team:
  - workplace policies
  - codes of conduct
  - organisational reputation and culture
- typical compositions of workplace teams, and the roles and responsibilities of team members within organisations
- techniques for giving and receiving feedback in a constructive manner
- methods to support team members
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities

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- methods and tools to work with others remotely:
  - collaboration via phone or mobile
  - collaboration via video conference
  - collaboration via other digital tools or software
- issues that may impact team performance and outcomes
- techniques to collaborate effectively with those working remotely.
-

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBXTW401 Lead and facilitate a team

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to effectively lead and facilitate a team in a workplace within any industry.

This unit has a specific focus on the teamwork skills required for team leader or supervisor level (depending on organisational structure) workers with responsibility for others or teams.

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

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

Elements Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Plan team outcomes	1.1 Identify common objectives of workplace team, responsibilities and required outcome(s) 1.2 Use performance plans to establish expected outcomes, goals, and behaviours for individual team members in accordance with team objective and relevant policies 1.3 Select appropriate strategies to ensure team members are accountable for their roles and responsibilities 1.4 Plan for contingencies that could impact the team

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2. Coordinate team and individuals	2.1 Communicate common team objectives and responsibilities to team members 2.2 Allocate tasks to team members based on staff expertise or development potential and provide appropriate instructions 2.3 Facilitate open and respectful communication and collaboration between team members, considering the needs of those from diverse backgrounds 2.4 Identify opportunities for cross collaboration amongst external and internal teams and individuals
3. Support team	3.1 Provide coaching to staff to enhance workplace culture 3.2 Support individuals according to organisational requirements to work towards common team goals 3.3 Facilitate team to identify, brainstorm, report and resolve task related issues and inefficiencies 3.4 Use problem solving skills to deal with any team, task or individual challenges
4. Monitor team performance	4.1 Measure team member performance against agreed work plans 4.2 Provide timely and constructive performance feedback to team members according to expected organisational standards 4.3 Identify specific learning and development opportunities to improve team and individual performance and behaviours 4.4 Implement action plans to address individual and team training needs

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Interact with others	• Uses appropriate communication practices when communicating with team members and facilitating activities • Establishes and builds relationships and rapport with team members to foster a positive team environment • Recognises the perspectives of team members and diversity of opinion, and manages conflict as required
Navigate the world of work	• Understands and explains ethical and legal, regulatory and organisational responsibilities to team

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Skill	Description
Get the work done	• Plans, organises and implements work activities in line with organisational policies and procedures

Unit Mapping Information

No equivalent unit. New unit.

Links

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

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Assessment Requirements for BSBXTW401 Lead and facilitate a team

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 4.0.

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- assign tasks to team members with appropriate instruction and considering any required contingencies
- provide feedback and assistance to team members
- collate feedback on individual and team performance
- identify and implement development opportunities for others
- manage conflicts and challenges according to organisational requirements.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational requirements relevant to workplace teams:
  - workplace policies
  - codes of conduct
  - organisational reputation and culture
- legislative requirements relevant to the workplace
- facilitation techniques to encourage team cohesion and effectiveness
- mentoring and coaching techniques to support team members
- strategies for conflict resolution and negotiation
- different methods and styles of communication
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities professional behaviours to role model as a leader
- typical workplace contingencies that can impact teams:
  - unplanned leave or absence of workers

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  - re-allocation of work tasks
  - succession planning for important team roles
- teamwork challenges relevant to performance evidence:
  - difficulties performing tasks
  - conflicts with clients or team members
  - potential risks or safety hazards
  - unethical or inappropriate behaviour.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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AHCBUS607 Implement a monitoring, evaluation and reporting program

Modification History

Release	Comments
Release 2	This version released with AHC Agriculture, Horticulture, Conservation and Land Management Training Package Version 2.0.
Release 1	This version released with AHC Agriculture, Horticulture, Conservation and Land Management Training Package Version 1.0.

Application

This unit of competency describes the skills and knowledge required to implement a monitoring, evaluation and reporting program.

All work must be carried out to comply with organisational requirements, work health and safety legislation and codes, sustainability practices and in consultation with the management team.

This unit applies to individuals who take personal responsibility for their own work and exercise autonomy in undertaking complex work. They must analyse information and exercise judgement to complete a range of advanced skilled activities. They analyse, design and communicate solutions to a range of complex problems.

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

Pre-requisite Unit

Nil

Unit Sector

Business (BUS)

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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. 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 provide information	3.1 Report against milestones and outputs 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	4.1 Foster a culture of self-evaluation and learning through encouraging ongoing participation, consultation and communication

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Element	**Performance criteria**
Elements describe the essential *outcomes.*	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
evaluation process	with stakeholders 4.2 Review and adapt ongoing evaluation strategy and processes and provide feedback on the implementation and the evaluation design

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential for performance in this unit of competency but are not explicit in the performance criteria.

Foundation Skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
AHCBUS607 Implement a monitoring, evaluation and reporting program Release 2	AHCBUS607 Implement a monitoring, evaluation and reporting program Release 1	Minor typographical error corrected	Equivalent unit

Links

Companion Volumes, including Implementation Guides, are available at VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72

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Assessment Requirements for AHCBUS607 Implement a monitoring, evaluation and reporting program

Modification History

Release	Comments
Release 2	This version released with AHC Agriculture, Horticulture, Conservation and Land Management Training Package Version 2.0.
Release 1	This version released with AHC Agriculture, Horticulture, Conservation and Land Management Training Package Version 1.0.

Performance Evidence

The candidate must be assessed on their ability to integrate and apply the performance requirements of this unit in a workplace setting. Performance must be demonstrated consistently over time and in a suitable range of contexts.

The candidate must provide evidence that they can:

- implement a monitoring and evaluation strategy
- collect and manage data
- analyse complex information
- prepare reports and supply information
- review the evaluation process.

Knowledge Evidence

The candidate must demonstrate knowledge of:

- quantitative and qualitative methods for monitoring and evaluation
- data management processes and systems
- policy and program management processes
- adaptive management and review cycles.

Assessment Conditions

Competency is to be assessed in the workplace or simulated environment that accurately reflects performance in a real workplace setting.

Assessors must satisfy current standards for RTOs.

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Links

Companion Volumes, including Implementation Guides, are available at VETNet: - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72

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AHCSAW302 Implement erosion and sediment control measures

Modification History

Release	TP Version	Comment
1	AHCv1.0	Initial release

Application

This unit of competency describes the skills and knowledge required to construct, install and maintain a range of measures specified on erosion and sediment control plans.

This unit applies to individuals who work under broad direction and take responsibility for their own work including limited responsibility for the work of others.

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

Pre-requisite Unit

Nil.

Unit Sector

Soil and Water Conservation (SAW)

Elements 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 and construction	1.1 Confirm that erosion and sediment control plan and schedule of works match site conditions 1.2 Identify survey pegs and site indicators on site 1.3 Match equipment and tools to program works and terrain on site 1.4 Verify work readiness of selected equipment and tools

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Element	Performance criteria
	1.5 Assess and minimise risks to others and the environment 1.6 Select and use appropriate personal protective equipment 1.7 Select materials to complete proposed works in line with construction schedule
2. Carry out implementation and construction	2.1 Plan work sequence 2.2 Construct earthworks 2.3 Install erosion and sediment control products and materials
3. Carry out repairs and maintenance procedures	3.1 Monitor site, identify issues and carry out repairs as necessary 3.2 Complete maintenance procedures as required 3.4 Clean and store machinery, tools and equipment 3.5 Complete work records

Foundation Skills

Foundation Skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Unit Mapping Information

This unit is equivalent to AHCSAW302A Implement erosion and sediment control measures

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72

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Assessment Requirements for AHCSAW302 Implement erosion and sediment control measures

Modification History

Release	TP Version	Comment
1	AHCv1.0	Initial release

Performance Evidence

The candidate must be assessed on their ability to integrate and apply the performance requirements of this unit in a workplace setting. Performance must be demonstrated consistently over time and in a suitable range of contexts.

The candidate must provide evidence that they can:

- construct, install and maintain a range of erosion and sediment control measures
- identify hazards and implement safe work procedures
- prepare for implementation and construction
- read and follow plans to carry out implementation and construction
- identify survey pegs and site indicators on site and on the plans
- carry out repairs and maintenance procedures to enterprise standards
- select equipment and materials appropriate for the task
- operate equipment and machinery according to safe work practices and manufacturer instructions
- clean and store equipment, machinery and tools according to organisational requirements

Knowledge Evidence

The candidate must demonstrate knowledge of:

- materials cartage pollution control
- sequence of working and timing/duration
- work health and safety issues relating to the equipment and the site
- equipment used
- materials suitable for constructing erosion and sediment control measures and where to source them on site
- limitations of structures including timing of maintenance, structure life cycle, specifications and standards

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Assessment Conditions

Assessors must satisfy current standards for RTOs.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72

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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

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

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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

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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

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

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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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Links

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

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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

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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

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

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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

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

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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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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 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	5.1 Consult relevant personnel and seek support for the

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ELEMENT	PERFORMANCE CRITERIA
continuity plan	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, 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	Description

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	Criteria	
Reading	1.1-1.3, 2.1	• Interprets organisation's reports, policies and procedures to develop business continuity management 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	BSBCON601B 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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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:

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- business continuity 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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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

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

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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 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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
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

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		questioning • Uses a range of persuasive responses and makes comparisons which show an understanding of topics and concepts
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 Release 2	BSBCRT401 Articulate, present and debate ideas Release 1	Updated to clarify assessment conditions	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
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.

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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 opportunities to present, discuss and debate ideas with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation 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

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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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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

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BSBCRT404 Apply advanced critical thinking to work processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to use advanced-level critical thinking skills in a professional context. This includes using methods of analysis, synthesis and evaluation.

This unit applies to individuals who evaluate processes, products and services that may be proposed or already existing. This unit applies to individuals who are typically responsible for developing work processes, products and services that may be proposed or already existing.

Licensing/Regulatory Information

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

Unit Sector

Creativity and Innovation – Critical 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. Understand critical thinking in a workplace context	1.1 Identify key characteristics of concepts in a critical thinking protocol or process 1.2 Explore situations in which critical thinking concepts may be applied in the workplace 1.3 Reflect on benefits of adopting a critical thinking mindset and

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ELEMENT	PERFORMANCE CRITERIA
	risks associated with failing to do so
2. Apply a systematic approach to decision making	2.1 Analyse and understand key elements of workplace processes, products or services 2.2 Identify limitations in existing or proposed workplace processes, products or services by applying critical thinking protocols or processes 2.3 Source information from a variety of different and verified sources 2.4 Compare and contrast alternative critical thinking concepts in a workplace decision making process 2.5 Apply a decision making framework to reach a defensible conclusion in a workplace context in accordance with organisational policies and procedure 2.6 Articulate and justify decision making process
3. Develop critical thinking mindset	3.1 Conduct review of effectiveness of decision making, including critical self-reflection 3.2 Seek meaningful feedback from organisational management 3.3 Identify areas for self-development 3.4 Develop plan for future process evaluations

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Reflects on own performance and seeks opportunities to improve own skills and knowledge
Reading	• Interprets, evaluates and extracts relevant information from a range of texts for work requirements
Writing	• Documents key research findings and ideas • Develops clear workplace documents appropriate to audience and context
Oral Communication	• Articulates ideas and requirements clearly and persuasively using techniques appropriate to audience and environment • Participates in a verbal exchange of ideas and elicits the view and

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	opinions of others by listening and questioning • Uses a range of persuasive responses and makes comparisons which show an understanding of topics and concepts
Numeracy	• Interprets and critically analyses numerical data to determine work process requirements
Navigate the world of work	• 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	• Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals • 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
Get the work done	• 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 • Recognises opportunities to develop and apply new ideas and select ideas for implementation • Considers the key themes and ideas to be explored and identifies ways to response to and use diverse perspectives • Uses features and functions of digital tools and technologies to store and present information • 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**
BSBCRT404 Apply	Not applicable	New unit	No equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
advanced critical thinking to work processes Release 1			

Links

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

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Assessment Requirements for BSBCRT404 Apply advanced critical thinking to work processes

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- explain critical thinking concepts and approaches, the value of applying such approaches, and how they may apply to a workplace context
- use a range of critical thinking techniques to identify and address limitations in workplace processes, products or services
- ask questions of self and others to broaden own knowledge and understanding
- use various information sources to provide answers to own questions
- develop a proposal to articulate to a broad range of workplace stakeholders a solution to an identified issue
- incorporate feedback and self-reflection to critically assess performance

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features and characteristics of critical thinking concepts and approaches
- key features and limitations of workplace procedures
- key legislative requirements relating to workplace procedures
- key sources of reliable information relevant to workplace procedures.

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:

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- office equipment, technology, software and consumables required to implement internal and maintain internal control procedures
- corporate governance documentation required for role
- organisational operational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation 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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BSBCRT502 Develop critical thinking in others

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop critical thinking skills in others within a professional context.

This unit applies to individuals who are developing and coaching teams or personnel, for whom critical thinking skills (including analysis, synthesis, and evaluation) are an important part of their job roles. This unit applied to individuals who are typically responsible for coaching and developing teams of people.

Licensing/Regulatory Information

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

Unit Sector

Creativity and Innovation – Critical 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. Facilitate learning in critical thinking concepts	1.1 Identify learning needs of individuals in relation to critical thinking skills by asking questions to identify knowledge gaps 1.2 Identify potential formal and informal learning opportunities 1.3 Clearly articulate key features of critical thinking concepts (including analysis, synthesis, and evaluation) to team members in

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ELEMENT	PERFORMANCE CRITERIA
	a way that is easily understood by diverse learner groups 1.4 Encourage questions and discussion from team members
2. Create learning environment that encourages development in critical thinking	2.1 Provide feedback to team members to recognise and encourage individual and team learning 2.2 Ensure organisational procedures maximise individual and team access to learning opportunities 2.3 Analyse current organisational systems to identify gaps or barriers to critical thinking 2.4 Research and analyse information about learning systems in other organisations and contexts 2.5 Set tasks and create opportunities for team members to apply critical thinking skills (including analysis, synthesis, and evaluation) to workplace problems 2.6 Expose ideas and options to ongoing testing, exploration and challenge
3. Monitor and improve learning effectiveness	3.1 Monitor team and individual performance to determine the type and extent of any additional work-based support required to enhance critical thinking 3.2 Use feedback from individuals and teams to identify and introduce improvements in future learning arrangements 3.3 Incorporate areas identified for further improvement when undertaking future planning

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Reflects on own performance and seeks opportunities to improve own skills and knowledge • Transfers skills and knowledge to a variety of learning development contexts
Reading	• Researches, analyses and evaluates textual information, from a wide range of sources, to identify information relevant to systems that support critical thinking and learning

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Writing	• Develops complex plans and strategies using language and format appropriate to the audience and purpose
Oral Communication	• Articulates ideas and requirements clearly and persuasively using techniques appropriate to audience and environment • Participates in a verbal exchange of ideas and elicits the views and opinions of others by listening and questioning • Uses a range of persuasive responses and makes comparisons which show an understanding of topics and concepts
Navigate the world of work	• Recognises and considers the implications of legal and regulatory responsibilities on own work • Adheres to implicit and explicit organisational policies and procedures, seeking advice from others if necessary
Interact with others	• Actively identifies the requirements of important communication exchanges, selecting appropriate channel, format, tone and content to suit purpose and audience • Applies a range of communication strategies to encourage others to share their knowledge and skills and reflect on the effectiveness of the interaction • Looks for ways of establishing connections and building genuine understanding with a diverse range of people • Uses inclusive and collaborative techniques to negotiate, influence and elicit the views and opinions of a wide range of stakeholders
Get the work done	• Uses logical processes to plan, implement and monitor learning in the workplace • Evaluates outcomes of learning processes to identify opportunities for improvement • Accepts responsibility for planning and implementing systems and strategies to achieve organisational goals, negotiating key aspects with others • Contributes to creating a climate where people feel comfortable to suggest, explore, adapt and adopt new ideas as a regular part of work life

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBCRT502 Develop critical thinking in others (Release 1)	Not applicable	New unit	No 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 BSBCRT502 Develop critical thinking in others

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- explain critical thinking concepts and approaches, and their application to a workplace context
- design/develop a learning system for the organisation that clearly supports the application of critical thinking methods and that is based on:
  - analysis of the organisation's objectives, existing processes, resources and barriers to critical thinking methods
  - individual and group input/feedback
  - research of existing best practice in industry
- ask questions of self and others to broaden knowledge and understanding of the team member cohort
- undertake monitoring activities of team skill development and apply relevant legislation and organisation policies for development of staff.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features and characteristics of critical thinking concepts and approaches
- key features of existing workplace objectives, processes and resources
- key characteristics of organisational learning environments and related learning systems
- key legislative requirements relating to workplace procedures
- key sources of reliable information relevant to workplace procedures
- key features of industry best practice approach to instruction on critical thinking 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 creativity and innovation – critical thinking field of work and include access to:

- office equipment, technology, software and consumables required to implement internal and maintain internal control procedures
- corporate governance documentation required for role
- case studies and, where possible, real situations in the workplace
- interaction with others
- organisational operational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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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

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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

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

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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 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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

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		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
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 Release 2	BSBCUS401 Coordinate implementation of customer service strategies Release 1	Updated to clarify assessment conditions	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment conditions
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

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
- 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBCUS402 Address customer needs

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	needs 1.3 Identify and communicate rights and responsibilities of customers to the customer as appropriate
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	1.1, 1.2, 1.3, 2.1,	• Clearly articulates customer's needs using language suitable to diverse audiences and employs listening

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Communication	2.2, 3.1, 3.2	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
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 Release 2	BSBCUS402 Address customer needs Release 1	Updated to clarify assessment conditions	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
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

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- 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.

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 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBCUS403 Implement customer service standards

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment conditions
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	improvement of customer service standards, policies and processes
2 Implement customer service systems	2.1 Encourage all personnel to consistently implement customer service systems 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	1.2, 2.1-2.4	• Uses the communication channel, tone and vocabulary that is appropriate to the audience and specific purpose

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others		• 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 • 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 Release 2	BSBCUS403 Implement customer service standards Release 1	Updated to clarify assessment conditions	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment conditions
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

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- explain relevant organisational procedures and standards for customer service standards and relationships.

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
- 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBCUS501 Manage quality customer service

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment conditions
Release 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	1.1 Investigate, identify, assess, and include the needs of customers in planning processes

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ELEMENT	PERFORMANCE CRITERIA
requirements	1.2 Ensure plans achieve the quality, time and cost specifications agreed with customers
2 Ensure delivery of quality products and services	2.1 Deliver products and services to customer specifications within 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

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		feedback and confirm understanding
Numeracy	1.2	• Interprets and comprehends mathematical information in organisation's business and customer service plans.
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 Release 2	BSBCUS501 Manage quality customer service Release 1	Updated to clarify assessment conditions	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
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

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- explain techniques for solving complaints including the principles and techniques involved in the management and organisation of:
  - customer behaviour
  - customer needs research
  - 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

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:

- 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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Links

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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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Links

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

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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

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

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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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Links

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

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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

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

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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

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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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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

Companion 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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BSBEBU511 Develop and implement an e-business strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to evaluate e-business models and strategies for use in a business context. This includes the ability to incorporate the results of these evaluations into the design of an e-business strategy, including marketing, buying and selling goods and services online.

It applies to individuals who possess skills and knowledge in a specialist business area, as well as knowledge of digital applications and other technologies. They apply these skills and knowledge in the evaluation, selection and implementation of new strategies for business, which incorporate e-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. Analyse opportunities for e-business	1.1 Undertake a competitive analysis to determine the likely impact new capabilities will have on industry sectors and competitors

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Complete value chain analysis to identify processes and relationships that may benefit from the adoption of e-business solutions, in accordance with organisational strategies 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, according to organisational policies and procedures 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, assessing against organisational strategies 2.3 Assess cost implications of implementation of e-business models 2.4 Determine an e-business model most appropriate in relation to organisational strategies
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, in accordance with organisational policies and procedures
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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets a range of textual information to evaluate opportunities, possible exemplars and technical considerations
Writing	• Takes personal notes and develops workplace documentation that clarifies complex ideas using language and structure to suit context and audience
Oral Communication	• 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	• Analyses numerical information to determine resources required for job
Navigate the world of work	• Develops and reviews organisational procedures to achieve broader workplace goals • Monitors adherence to organisational procedures and legislative requirements
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts
Get the work done	• 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
BSBEBU511 Develop and implement an e-business strategy	BSBEBU501 Investigate and design e-business solutions	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBEBU511 Develop and implement an e-business strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- analyse and evaluate e-business opportunities involving new business models and not simply electronic versions of existing businesses, including but not limited to:
  - undertaking a value chain analysis
  - identifying threats and opportunities
  - determining cost and revenue impacts
- provide supporting evidence for choice of e-business solution
- formulate purpose, objectives and values for an e-business
- identify and address target markets and e-business resourcing needs
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of a value chain analysis when assessing potential e-business solutions
- Key features of relevant legislation, regulations, standards and codes of practice that may affect the implementation of the e-business solution
- Key features of a range of e-business models
- Key features of the organisational policies and procedures relating to the implementation of the e-business solution
- Key features of organisational strategy related to e-business solutions.

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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 – e-business field of work and include access to:

- office equipment and materials, including office technology
- relevant organisational policies and procedures
- documentation relating to analysis and implementation
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment conditions
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify a range of strategies to meet candidate and legislative requirements 1.4 Evaluate and assess products and services for candidates 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

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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, 2.1, 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	BSBEMS403 Develop and provide employment management services	Updated to clarify assessment conditions	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
to candidates Release 2	to candidates Release 1		

Links

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

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Assessment Requirements for BSBEMS403 Develop and provide employment management services to candidates

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0 Version created to clarify assessment conditions
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

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- identify and describe a range of techniques used in training, coaching and mentoring candidates.

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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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

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

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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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BSBFIA412 Report on financial activity

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to prepare financial reports in line with statutory reporting requirements. It encompasses compiling and analysing data.

This unit applies to individuals that are required to apply specialised knowledge and analytical skills to prepare financial reports as part of their job role.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Business Services Training Package Companion Volume Implementation Guide or the relevant regulator for specific guidance on regulatory requirements.

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 and analyse financial 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 data in accordance with organisational requirements 1.3 Make, record and disclose asset and liability valuations in compliance with accounting standards

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Ensure that discrepancies, unusual features or queries are identified, resolved or referred to the appropriate authority 1.5 Identify and record effects of taxation
2. Prepare reports	2.1 Correctly record income and expenditure to ensure compliance with statutory requirements 2.2 Correctly identify relevant receipts, revenue documentation and payments 2.3 Prepare reports according to statutory and ethical requirements, and organisational procedures relating to conflict of interest, confidentiality, and disclosure statements 2.4 Present charts, diagrams, tables and supporting data in required format 2.5 Review statements and data for errors and compliance with statutory requirements and organisational procedures, and amend as required 2.6 Submit statutory requirement reports to appropriate authorities within stated deadlines
3. Provide financial business recommendations	3.1 Review recommendations and ensure they are logically derived and supported by evidence 3.2 Provide recommendations to enhance the effectiveness of functions and services 3.3 Ensure recommendations are concise and relevant to the direction and control of organisational 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Compares and analyses information from a range of sources varying in complexity to determine and complete financial requirements

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Writing	• Records numerical and textual information incorporating required financial language organising data in a manner that supports the format and purpose of the document
Oral Communication	• 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	• 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	• Recognises, understands and applies applicable legislation, industry standards and organisational policies and procedures in the conduct of own work
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with external stakeholders to supply required information
Get the work done	• 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**
BSBFIA412 Report on financial activity Release 1	BSBFIA402 Report on financial activity Release 1	Updates to elements, performance criteria and assessment requirements.	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 BSBFIA412 Report on financial activity

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- organise and present financial data to highlight relevant features and meet workplace requirements including:
- budget variances
- budgets and forecasts
- cash flow/profit reports
- balance sheets
- financial year reports
- operating statements
- expenditure and receipts
- profit and loss statements
- 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, where applicable
- 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.

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Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of legislation, regulation and codes of practice relevant to financial operations
- key techniques used for forecasting and analysis
- key features of the options, methods and practices for deductions, benefits and depreciations
- current business taxation requirements for preparing corporate accounting reports
- current financial legislation and statutory requirements relating to taxable transactions and reporting requirements
- ethical requirements associated with preparing financial reports for corporate entities, including conflict of interest, confidentiality, and disclosure requirements
- industry-standard methods and formats used to present financial data.

Assessment Conditions

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 in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	allowances 1.3 Establish control measures to safeguard organisation's financial resources in accordance with legislative and organisational requirements 1.4 Establish systems to ensure statutory obligations are met and records are kept for the period determined by government legislation
2 Prepare payroll data	2.1 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	Description

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	Criteria	
Reading	1.1-1.4, 2.1, 2.2, 3.1-3.3, 4.1-4.5	• Identifies and interprets information from organisational policies, legislative and industry-related 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**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBFIM502 Manage payroll	BSBFIM502A Manage 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 BSBFIM502 Manage payroll

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 1	This version first released with BSB 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

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- business technology
- payroll system
- 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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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.

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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

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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

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

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BSBGOV404 Communicate with community stakeholders

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required for committee or board members to communicate with community stakeholders, including other organisations, to engage people in association or club activities.

It applies to individuals who to interact with community stakeholders in their roles as members of committees or boards of governance.

No licensing, legislative 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. Plan the organisation's community stakeholder communication strategy	1.1 Access the organisation's planning documentation to determine policies and protocols for community stakeholder communication 1.2 Assess trends in the community relevant to geographic, social or political contexts to determine how they relate to the organisation 1.3 Discuss proposed organisational communication stakeholder strategy with board and/or committee members 1.4 Assess the success of past community stakeholder

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ELEMENT	PERFORMANCE CRITERIA
	communication methods 1.5 Determine the most appropriate communication methods to engage with community stakeholders to promote the organisation 1.6 Evaluate options for action with community stakeholders and identify preferred options 1.7 Convey information on preferred communication options with community stakeholders to the board and/or the committee 1.8 Follow organisational policies and procedures for confidential information
2. Implement the organisation's community stakeholder communication strategy	2.1 Communicate organisational community stakeholder communication strategy to appropriate personnel and/or volunteers 2.2 Assign appropriate communication methods to designated personnel and/or volunteers 2.3 Coordinate activity and establish the timing of community stakeholder communication, in accordance with the organisation's strategy 2.4 Raise and discuss issues of importance with community stakeholders 2.5 Invite individuals and groups affected by issues to participate in relevant community stakeholder forums or meetings, where appropriate 2.6 Provide information to community stakeholders about the organisation’s activities 2.7 Gather and evaluate feedback from the community and stakeholders about the organisation's activities, and share with other committee or board members 2.8 Deal with feedback according to policies and procedures, and in consultation with management 2.9 Advise community stakeholders of board or committee decisions and the reasons behind them, in accordance with the organisation's strategy 2.10 Update organisational records from background information gathered through relevant networks
3. Review the organisation's community stakeholder communication activities	3.1 Monitor the organisation's community stakeholder communication activities 3.2 Determine the effectiveness of the organisation's community stakeholder communication activities 3.3 Discuss scope for improvement to organisational community

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ELEMENT	PERFORMANCE CRITERIA
	stakeholder communication activities with relevant personnel or volunteers 3.4 Propose and make arrangements for improvements to the organisation's community stakeholder communication activities 3.5 Document organisational communication 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, 1.4, 2.8, 2.10, 3.1	• Evaluates and integrates facts and ideas to construct meaning from a range of text types
Writing	2.9, 2.10, 3.5	• Uses clear, specific and industry related terminology to complete and update workplace documentation
Oral Communication	1.3, 1.7, 2.1-2.9, 3.3, 3.4	• Conducts information sessions and clearly articulates requirements using language, tone and syntax appropriate to audience and environment • Uses active listening and questioning skills to confirm understanding for requirements
Navigate the world of work	1.2, 1.3, 1.6, 1.8, 2.3, 3.2,3.4	• 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	1.3, 1.6, 1.7, 2.1-2.9, 3.2-3.4	• Recognises importance of building rapport to establish effective working relationships • Recognises importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and how
Get the work done	1.4, 1.5, 1.8, 2.2, 2.3, 2.7, 2.9, 3.1, 3.2, 3.4	• 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 • Uses online forums, blogs and social networking sites to connect with the community, following appropriate online etiquette

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		• Actively contributes to group decision-making when required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBGOV404 Communicate with community stakeholders	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 BSBGOV404 Communicate with community stakeholders

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- plan community stakeholder communication strategy
- coordinate activities to implement community stakeholder communication strategy
- facilitate communication channels with community stakeholders
- present information in an appropriate format for community stakeholders
- review organisational community stakeholder communication 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:

- outline organisational community stakeholder engagement strategy
- list community consultation methods
- explain the concept of community control of organisations and how it may impact stakeholder communication requirements with the community
- explain effective stakeholder communication strategies for sharing information with individuals and groups
- explain how activity may be coordinated to maximise the effectiveness of community stakeholder communication
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact stakeholder communication methods
- outline information gathering, analysis and presentation methods
- identify organisational policies and procedures on communicating with community stakeholders and maintaining confidentiality of information
- list relevant protocols when communicating with community stakeholders.

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Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of issues considered by committees or boards of governance, including community feedback.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV405 Undertake the roles and responsibilities of committee or board members

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to meet the diverse roles, responsibilities, codes of conduct and behavioural protocols required of committee or board members.

It applies to individuals responsible for monitoring and guiding the activities of their organisations as members of committees or boards of governance.

No licensing, legislative 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 roles within an organisation	1.1 Identify the core functions and structure of the organisation 1.2 Describe the relationships between the organisation, its stakeholders and other organisations or entities 1.3 Explain individual responsibilities of committee and board members within an organisation 1.4 Identify differences between roles of governance and

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ELEMENT	PERFORMANCE CRITERIA
	management 1.5 Assess the relationships and overlapping roles between board, committee and staff
2. Work within structure of the organisation	2.1 Perform designated committee or board duties 2.2 Follow the committee or board's decision making processes 2.3 Manage real and perceived conflict of interest issues that are associated with competing roles and responsibilities 2.4 Follow policies and procedures on confidentiality
3. Follow legal requirements	3.1 Comply with legislative requirements that apply to organisational committee or board duties 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 Identify and analyse outcomes for each operational area 4.2 Use information provided to review effectiveness and efficiency of operations and associated policy 4.3 Suggest changes to operations or policy 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, 3.1-3.4, 4.1-4.3	• Gathers, interprets and analyses information relating to core functions of the organisation, such as organisational goals, standards and values
Writing	1.2, 1.3, 4.3	• Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations
Oral	1.2, 2.3, 4.3	• Participates in a verbal exchange of ideas and clearly

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Communication		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	1.4, 1.5, 2.4, 3.1-3.4, 4.2	• Understands nature and purpose of own role and associated responsibilities and how it contributes to the work of others in immediate work context • 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
Interacts with others	1.3, 4.3	• 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	2.1-2.3, 3.2, 4.1- 4.3	• 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**
BSBGOV405 Undertake the roles and responsibilities of committee or board members	Not applicable	New unit	No equivalent unit

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Links

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Assessment Requirements for BSBGOV405 Undertake the roles and responsibilities of committee or board members

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- perform board/committee duties in accordance with organisational constitution, codes of conduct, legislation and internal policies and procedures
- manage conflicts of interest.

Note: If a specific volume or frequency 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 decision-making techniques
- compare and contrast governance and management roles and responsibilities
- outline how legislation and funding arrangements or funding body requirements impact roles and responsibilities of committee and/or board members.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

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

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

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Links

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BSBGOV501 Review and apply the organisation's constitution

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to ensure the organisation’s constitution is relevant, legal, understood, and meets changing needs.

It applies to individuals responsible for monitoring, guiding and undertaking decision making activities as members of committees or boards of governance.

No licensing, legislative 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 the organisation's constitution	1.1 Review the organisation's constitution to ensure it is consistent with relevant law, with the support of experts where required 1.2 Discuss the organisation's constitution with relevant organisational personnel or volunteers to communicate its purpose 1.3 Assess the organisation's constitution to ensure it is consistent with the organisation's purpose
2. Apply the constitution	2.1 Follow constitutional provisions when conducting committee or board activity

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Check policies and programs to ensure they conform to the constitution 2.3 Identify geographic, social, economic and political contexts in which the organisation operates and assess how these may impact on provisions in and application of the constitution
3. Make provision for constitutional amendment processes	3.1 Devise organisational administrative procedures for formal documentation of constitutional changes 3.2 Ensure processes for amendment to the organisation's constitution are in accordance with relevant procedures and are communicated to committee or board 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, 1.3, 2.1-2.3, 3.1, 3.2	• Interprets various texts to guide activities and decisions • Analyses and evaluates validity of information to identify gaps or inconsistencies between texts
Writing	3.2	• Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	1.2, 3.1	• Participates in a variety of spoken exchanges using suitable tone, language and strategies to confirm, clarify or repair understanding • Makes constructive suggestions when required • Elicits views and opinions of others by active listening and questioning
Navigate the world of work	1.1, 1.3, 2.2, 3.1, 3.2	• 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	1.2, 3.2	• Follows accepted communication practices and protocols, adjusting personal communication style in

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others		response to values, beliefs and cultural expectations of others
Get the work done	1.1, 2.2, 2.3, 3.1	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to 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**
BSBGOV501 Review and apply the organisation's constitution	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 BSBGOV501 Review and apply the organisation's constitution

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- review the organisation's constitution
- communicate effectively with others to ensure they understand constitutional, legal and organisational requirements
- document constitutional amendments according to workplace policies and procedures
- follow the constitution when undertaking committee or 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 organisation's purpose and how it may impact on provisions in and application of the constitution
- identify legislation that can impact on provisions of constitution
- list geographic, social, economic and political contexts in which particular organisations operate and how these may impact on provisions and application of the 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 committee or board of governance activities and include access to:

- participation on an actual or simulated board
- expert knowledge and resources relevant to constitution.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV502 Recruit and coordinate committee members

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to recruit, develop and support committee members in an organisation. This includes planning for committee recruitment, communicating with members and prospective committee members, and coordinating processes.

It applies to individuals responsible for activities as members of committees or boards of governance.

No licensing, legislative 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 the need and roles for committee members	1.1 Identify the potential roles of committee members 1.2 Discuss and agree on roles of committee members with board members or management 1.3 Develop and document role descriptions
2. Recruit committee members	2.1 Seek volunteer committee members by advertising in relevant media or community stakeholder networks

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Arrange and conduct interviews with potential committee members 2.3 Make selections and advise relevant parties 2.4 Follow policies and procedures on confidentiality of information
3. Introduce new committee members to organisational requirements	3.1 Inform new committee members about the organisation's purpose 3.2 Provide new committee members with an induction to the organisation's committee activity 3.3 Arrange for training in specific committee roles in a manner that is appropriate to the organisation's needs and resources
4. Provide ongoing support to committee members	4.1 Regularly review committee member roles and performance 4.2 Provide individual support and debriefing in accordance with organisational protocols 4.3 Identify organisational processes that can be used to support committee members in their 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
Reading	1.1, 1.2, 2.4	• Gathers, interprets and analyses information relating to core functions of committee members and the organisation, such as organisational goals, standards and values
Writing	1.3, 2.1	• Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.2, 3.1, 4.2	• Conducts information sessions 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	1.1, 2.1-2.3, 3.2,	• Appreciates implications of legal and regulatory

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world of work	4.1-4.3	responsibilities related to committee activity • Recognises and follows explicit and implicit protocols and meets expectations associated with the recruitment and coordination of committee members
Interacts with others	1.2, 2.1, 2.2, 3.1-3.3, 4.2	• Collaborates with others for the selection of committee members • 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, 2.1-2.3, 3.2, 3.3, 4.2	• Takes responsibility for recruitment and coordination of activity • 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**
BSBGOV502 Recruit and coordinate committee members	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 BSBGOV502 Recruit and coordinate committee members

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- communicate effectively with a diverse range of people on issues relevant to committee membership and roles
- recruit, select and induct people for committee roles according to policies, procedures and legislative requirements
- coordinate people, processes and information for committee recruitment and induction purposes
- contribute to analysis and decision making on issues relevant to committee member recruitment.

Note: If a specific volume or frequency 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 legislation and organisational policies relating to the employment of committee members, who may be unpaid workers
- outline a range of decision making techniques
- explain committee and management roles and responsibilities
- describe the organisational history, structure, core functions, code of conduct, constitution, policies and procedures, and reporting processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee recruitment and coordination activities and include access to:

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- actual or simulated committee recruitment and coordination
- examples of committee role descriptions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV503 Conduct organisational strategic planning

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to plan and conduct organisational strategic processes. It includes arranging board or committee strategic planning procedures, which incorporate rules, legislation, regulations and codes of practice relevant to the organisation.

It applies to individuals responsible for monitoring, guiding and undertaking decision making activities as members of committees or boards of governance.

No licensing, legislative 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. Establish the organisation's strategic planning process	1.1 Discuss the organisation's strategic planning needs with other board or committee members 1.2 Allocate appropriate resources to undertake strategic planning
2. Develop and review the organisation's values,vision and purpose	2.1 Consult other board and/or committee members, management, staff and/or key stakeholders regarding the values, vision and purpose of the organisation

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Obtain board or committee endorsement for the agreed organisational values, vision and purpose 2.3 Document organisational values, vision, purpose and objectives and the processes undertaken
3. Establish strategies to meet organisational objectives	3.1 Identify and analyse stakeholder aspirations, interests and needs and review the organisation's previous plans, in the case of an existing organisation 3.2 Analyse internal and external factors such as changing government policy; economic, social and political issues; and provisions of federal, state/terrritory legislation and funding body requirements that might affect the organisation 3.3 Identify and analyse relevant economic and/or political trends and the potential for strategic alliances and/or partnerships 3.4 Develop and agree on achievable strategies to meet objectives, with other board or committee members, seeking advice from experts when necessary 3.5 Develop key performance indicators or targets, timelines and reporting requirements for the strategic planning period with other board or committee members 3.6 Provide guidance on operational processes that need to be put in place to ensure that organisational strategies are followed and document factors that may affect achievement of objectives and targets
4. Monitor and evaluate organisational performance	4.1 Monitor and evaluate progress reports against the plan to identify progress towards key performance indicators or targets, timeliness and performance gaps 4.2 Review and revise strategic objectives and strategies with other board or committee members where necessary and document organisational performance for the agreed strategic planning period

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	3.1-3.3, 4.1	• Interprets various texts to guide activities and decisions

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		• Analyses and evaluates validity of information to identify gaps or inconsistencies between texts
Writing	2.3, 3.6	• Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	1.1, 2.1, 2.2, 3.4, 3.5, 4.2	• Participates in a variety of spoken exchanges using suitable tone, language and strategies to confirm, clarify or repair understanding • Makes constructive suggestions when required • Elicits views and opinions of others by active listening and questioning
Navigate the world of work	1.1, 1.2, 2.2, 3.1, 3.3-3.5, 4.1, 4.2	• 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, 2.1, 2.2, 3.4, 3.5, 4.2	• Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others
Get the work done	1.2, 2.2, 2.3, 3.1, 3.4, 3.5, 4.1, 4.2	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to 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**
BSBGOV503 Conduct organisational strategic planning	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 BSBGOV503 Conduct organisational strategic planning

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- communicate and negotiate to work cooperatively with:
  - other board or committee members
  - management and/or staff of the organisation
  - key stakeholders
- evaluate the progress of the strategic plan and analyse:
  - organisational values, vision, purpose, objectives and key performance indicators and targets
  - economic and/or political trends relevant to the organisation
  - potential for strategic alliances and/or partnerships
  - stakeholder aspirations, interests and needs
- monitor operational processes to ensure organisational objectives and targets are met
- document organisational performance for the agreed strategic planning period.

Note: If a specific volume or frequency 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 roles and responsibilities of board or committee and management in strategic planning
- explain geographic, social, economic and political contexts in which relevant organisations operate and how these may impact upon strategic planning
- explain the principles and components of the strategic planning cycle
- discuss organisational policies and procedures relevant to strategic planning

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- list provisions of federal, state or territory legislation and funding body requirements that may influence decision making
- list resources required to undertake strategic planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of strategic planning documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV504 Monitor organisational finances

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required for board or committee members to maintain effective organisational financial accountability systems in order to monitor organisational finances.

It applies to members of committees or boards of governance.

No licensing, legislative 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 organisational financial management processes	1.1 Document respective financial management responsibilities of the board or committee, and management 1.2 Explain legal responsibilities of individual board members and the board as a whole to the committee or board 1.3 Determine financial information required by the board or committee from management 1.4 Identify the statutory requirements of the board or the committee

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Seek advice on suitable financial management systems that will enable reporting against the organisation's overall financial health.
2. Apply financial management processes and systems	2.1 Access appropriate policies and procedures to open and/or operate necessary bank accounts 2.2 Identify approved signatories for the bank accounts 2.3 Access finance procedures and reporting requirements specified by organisational stakeholders or funding bodies, and check that requirements for finance documentation are met 2.4 Review timelines to ensure financial statements are completed within the timeframe required by relevant corporate authorities, organisational stakeholders and/or funding bodies 2.5 Review documentation for authority and delegation between the board or committee and management for the management of finances 2.6 Ensure statutory requirements with regard to financial management are followed 2.7 Review policies and procedures to ensure they provide checks and balances to prevent, identify and deal with fraud 2.8 Review organisational procedures and documentation for receiving and expending funds 2.9 Review process for financial reporting against organisational budget and ensure established procedures and maintained by management
3. Meet financial reporting requirements	3.1 Ensure financial information is made available to members as specified in the constitution 3.2 Facilitate the clear presentation of financial information at meetings 3.3 Identify the type and content of financial information that can be made publicly available
4. Monitor organisational expenditure	4.1 Review and evaluate organisational budget and financial statements to ensure they meet requirements 4.2 Compare income and expenditure to budget and previous periods and identify and investigate discrepancies 4.3 Discuss achievement and variances to the budget in committee or board meetings 4.4 Discuss the danger of being insolvent with board or committee members to ensure they understand their legal obligation not to

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ELEMENT	PERFORMANCE CRITERIA
	trade while insolvent 4.5 Document recommendations for action or 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	1.2, 1.3, 2.1, 2.3-2.7, 3.3, 4.1, 4.2	• Evaluates and integrates facts to construct meaning from a range of organisational documents
Numeracy	1.4, 2.8, 3.1-3.3, 4.1-4.3	• Works in a group to assess organisational financial issues
Writing	1.1, 4.4	• Uses clear, specific and industry-related terminology to update finance-related policy and procedures
Oral Communication	1.4, 2.8, 3.2, 4.3	• Uses active listening and questioning skills to confirm understanding for requirements • Refers to or presents information relating to organisational finances
Navigate the world of work	1.1, 1.2, 2.1-2.8, 3.1, 3.3, 4.1-4.4	• 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	1.4, 2.8, 3.1,3.2, 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, 1.2, 2.1-2.8, 4.1-4.3	• 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 • Actively contributes to group decision-making when required

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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.

Suitable financial management systems must include:	the use of financial ratios as a heuristic for financial health resilience solvency
Suitable financial reports must include:	balance sheet cash flow profit and loss statement written report

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBGOV504 Monitor organisational finances	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 BSBGOV504 Monitor organisational finances

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- review the following organisational financial management systems:
  - use of financial ratios as a heuristic for financial health
  - resilience
  - solvency
- review the following organisational financial management reports:
  - balance sheet
  - cash flow
  - profit and loss statement
  - written report
- apply financial management processes and systems that accurately measure organisational performance against:
  - the organisation's budget
  - the organisation's overall financial health
  - long term organisational financial planning
- communicate effectively with board or committee members, and stakeholders on financial issues
- put processes in place to ensure that:
  - finance procedures and reporting requirements specified by organisational stakeholders or funding bodies are met
  - fraud is identified, managed and prevented
- ensure adherence to the following organisational financial systems:
  - financial statement timelines
  - procedures for receiving and expending funds
  - statutory and delegation requirements
  - the budget process
- examine and identify variances in budget and investigate discrepancies

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- identify the risk associated with an organisation heading towards insolvency and the action required:
  - cease trading
  - seek assistance
- document financial 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:

- outline the following financial responsibilities of management and board or committee members:
  - statutory and delegation authority
  - delegation and information requirements
- explain the statutory requirements of the board or committee
- discuss suitable financial management systems that enable the organisation to report against:
  - the organisation's budget
  - the organisation's overall financial health
  - long term organisational financial planning
- outline documentation requirements with regard to finance reporting requirements and finance procedures
- list board or committee financial reporting requirements

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of financial statements and budgets discussed by committees or boards of governance
- examples of issues boards or committees of governance have worked on, including community feedback and strategic decisions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

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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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BSBGOV505 Seek and apply for funding opportunities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to seek and apply for funding opportunities that complement or expand the organisation's purpose, strategies and activities. It includes locating funding sources in order to make submissions.

It applies to individuals responsible for monitoring, guiding and undertaking decision making activities as members of committees or boards of governance.

No licensing, legislative 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. Discuss organisational business ideas to seek funding	1.1 Canvass organisational stakeholders for business ideas and options that are relevant to the organisation's objectives and purpose 1.2 Discuss business ideas with other board or committee members and agree on the potential sourcing of external funding
2. Research potential funding sources	2.1 Gather information about potential funding bodies' priorities 2.2 Analyse potential funding sources that meet organisational objectives, needs and/or aspirations

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Analyse potential project or grant funding and the resource implications of successful submissions 2.4 Discuss potentially appropriate funding projects or grants with other board or committee members with a view to making submissions at the required times
3. Apply for funding	3.1 Seek advice or form a team to oversee funding applications of identified funding sources, seeking expert advice where appropriate 3.2 Identify and address project funding criteria within set timelines 3.3 Arrange for the editing of funding application(s) 3.4 Submit the funding application by the due date
4. Conduct submission follow-up activity	4.1 Put processes and resources in place for successful applications that ensure project or grant deliverables are met within set timelines 4.2 Seek and document feedback for unsuccessful applications to inform and improve future funding submission activity and consider if it is appropriate to conduct appeal 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, 3.1, 3.2	• Interprets various texts to guide activities and decisions • Analyses and evaluates validity of information to identify gaps or inconsistencies between texts
Writing	3.3	• Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	1.1, 1.2, 2.4, 3.1	• 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	1.1, 1.2, 2.2, 3.1, 3.2	• Takes personal responsibility for adherence to

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world of work		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, 2.4, 3.1	• Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others
Get the work done	1.1, 2.2, 2.3, 3.1, 3.3, 3.4, 4.1, 4.2	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to 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**
BSBGOV505 Seek and apply for funding opportunities	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 BSBGOV505 Seek and apply for funding opportunities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- gather information about potential funding bodies' priorities
- conduct analysis of:
  - potential funding bodies and potential funding tenders to assess if they are in line with organisational objectives, needs and aspirations
  - project funding criteria
- communicate and work effectively with board or committee members, and stakeholders on potential funding projects or grants
- meet prospective project funding application deadlines
- conduct appropriate follow-up activity following funding application
- document activity relevant to funding 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:

- explain the organisational stakeholders needs and how the organisation will benefit from proposed funding submissions
- list funding sources and their requirements
- explain geographic, social, economic and political contexts in which particular organisations operate and how these may impact on how funding is sourced and used
- list organisational policies and procedures in relation to obtaining funding
- discuss provisions of federal, state or territory legislation and funding body requirements that impact on how funds may be sourced and used
- list relevant consultancy services to support funding submissions

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- discuss relevant protocols and cultural responsibilities that impact on how funding is sourced
- explain appeal procedures available if funding submission is rejected.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of committee or board funding applications.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV506 Manage advocacy for your organisation

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to promote the services of your organisation as a board or committee member.

It applies to individuals responsible for advocating for an organisation as members of committees or boards of governance.

No licensing, legislative 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 need for advocacy	1.1 Assess trends relevant to geographic, social or political contexts to determine how they relate to the organisation 1.2 Provide management and organisational board or committee members with information about options for meeting identified organisational needs via advocacy 1.3 Assist management and organisational board or committee members to identify the organisation's preferred options for advocacy 1.4 Develop advocacy strategies, timelines and reporting requirements in consultation with management and organisational board or

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ELEMENT	PERFORMANCE CRITERIA
	committee members
2. Promote the organisation	2.1 Promote organisational objectives in a manner that has been agreed to by the board or committee in appropriate forums 2.2 Make contact with stakeholders nominated by the board or committee and promote organisational objectives 2.3 Document promotional activity
3. Review advocacy activity	3.1 Review the advocacy activity at the nominated time and evaluate its success in terms of achieving organisational goals 3.2 Discuss achievements with management and organisational board or committee members and make appropriate amendments to future advocacy 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	1.1, 3.1	• Interprets various texts to guide activities and decisions • Analyses and evaluates validity of information to identify gaps or inconsistencies between texts
Writing	2.3	• Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	1.2-1.4, 2.1, 2.2, 3.2	• 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	1.2, 1.3, 2.1, 2.2, 3.1, 3.2	• 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

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Interact with others	1.2-1.4, 2.1, 2.2, 3.2	• Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others
Get the work done	1.2-1.4, 2.1-2.3, 3.1, 3.2	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to 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**
BSBGOV506 Manage advocacy for your 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 BSBGOV506 Manage advocacy for your organisation

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- develop advocacy plans for an organisation based on :
  - objectives
  - strategies
  - promotional activity
- communicate effectively with board or committee members, and stakeholders on organisational promotion
- put processes in place to ensure that organisational advocacy strategies specified by the management and an organisation's board or committee are carried out
- ensure adherence to the following:
  - promotional timelines
  - promotion at appropriate forums and visits
- document advocacy activity
- review and evaluate the success of organisational advocacy 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 organisational advocacy strategy
- list promotional consultation methods
- explain the concept of advocacy and how it may impact organisational stakeholder communication requirements
- explain effective advocacy strategies
- explain how activity may be coordinated to maximise the effectiveness of advocacy

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- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact stakeholder advocacy
- outline information gathering, analysis and presentation methods
- describe organisational policies and procedures on advocacy
- list relevant protocols when communicating with stakeholders
- outline documentation requirements with regard to finance reporting requirements and finance procedures.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of organisational advocacy strategies.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBGOV507 Manage board or committee and organisational conflict

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to manage conflict, both within the board or committee and with operational personnel in the organisation.

It applies to individuals who are on committees or boards of governance.

No licensing, legislative 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 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 Consider if the conflict relates to operational or strategic activity 2.2 Acknowledge the issue(s) and the roles of the parties involved, noting that board and committee members' roles are strategic and employees' roles are operational

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Ascertain how the roles of the parties involved have impacted upon the conflict 2.4 Develop resolution strategies in accordance with legislation, the organisation's constitution and in consultation with conflicting parties 2.5 Seek professional advice where needed, maintaining discretion and confidentiality 2.6 Ensure the 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 resolution strategies that are in line with legislation and the roles of the parties involved 3.2 Diffuse emotional situations by focussing on the issue(s) rather than the individual(s) concerned 3.3 Follow organisational grievance policy if conflict has escalated to grievance level 3.4 Allow sufficient time for the conflict to be resolved 3.5 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	1.1, 3.1	• Interprets various texts to guide activities and decisions
Writing	1.3, 2.4	• Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	2.2-2.4, 3.2	• 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

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Navigate the world of work	1.1-1.3, 2.1, 2.2, 2.4, 3.1, 3.2, 3.4	• 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	2.2-2.4, 2.6, 3.2, 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 done	1.3, 2.1, 2.4, 2.5, 3.1, 3.3, 3.4	• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to 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**
BSBGOV507 Manage board or committee and organisational conflict	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 BSBGOV507 Manage board or committee and organisational conflict

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- communicate, negotiate and work cooperatively regarding conflict with:
  - other board or committee members
  - management and staff of the organisation
  - key stakeholders
- develop strategies to prevent conflict both within the board or committee and between the board or committee and operational personnel
- develop resolution strategies with conflicting parties
- diffuse emotional conflict situations by focusing on the issues at hand
- monitor and evaluate conflict resolution 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:

- discuss potential situations of future conflict
- explain the roles of the parties involved (in terms of board or committee member roles as opposed to operational personnel roles)
- discuss options for conflict resolution and situations that would warrant the use of the following methods:
  - formal discussions with third party presence
  - informal discussions
  - following organisational policies
  - professional advice
  - grievance procedures

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- describe conflict monitoring and evaluation processes
- describe legislative and organisational constitutional requrirements in relation to conflict.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of conflict resolution.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBHRM403 Support performance management process

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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,	• Develops a range of documentation using tone,

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	3.3, 3.4	structure and language suited to context and audience
Oral Communication	1.3, 1.6, 2.1-2.4, 3.4	• Asks questions and listens carefully to gather and evaluate information • 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	BSBHRM403B Support performance management 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 BSBHRM403 Support performance management process

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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.

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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:

- human resource policies, procedures and documentation relevant to performance management and feedback
- 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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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

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

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BSBHRM505 Manage remuneration and employee benefits

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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

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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 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	BSBHRM505B Manage remuneration and employee benefits	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 BSBHRM505 Manage remuneration and employee benefits

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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:

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- income tax
- superannuation reporting
- FBT and bonus payments.

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

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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

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

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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

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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

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

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BSBINT305 Prepare business documents for the international trade of goods

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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	1.1 Discuss requirements for transport of goods internationally

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ELEMENT	PERFORMANCE CRITERIA
transported 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 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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	1.3, 2.1-2.3, 3.1, 3.2, 4.1, 4.2, 4.4-4.6, 5.1,	• Uses logically sequenced steps to plan and implement tasks required to achieve work outcomes

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done	5.3-5.5	• Uses analytical skills to make decisions directly related to role, seeking assistance when required

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBINT305 Prepare business documents for the international trade of goods	BSBINT305B Prepare business documents for the international trade 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 BSBINT305 Prepare business documents for the international trade of goods

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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.

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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:

- 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

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

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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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Links

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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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Links

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

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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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Links

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

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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

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

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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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Links

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

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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

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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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BSBITA411 Design and develop relational databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to design and develop a multi-table relational database (including queries, forms and reports) to meet a defined need using existing data and available digital database applications/platforms.

It applies to individuals who may work independently or within an administrative support role, with the responsibility to develop and use databases to store and retrieve data using commercially available applications/platforms.

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 Identify 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 in accordance with organisational and task requirements 1.3 Select appropriate digital application/platform according to organisational and task requirements, available resources, and required scope and functionality of database

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Create and document proposed database structure, and share with appropriate personnel in accordance with organisational policies and procedures 1.5 Seek feedback on proposed database design from appropriate personnel
2. Develop database	2.1 Set field attributes according to data type and link databases by a common field in accordance with database application usage 2.2 Assign primary key to uniquely identify data 2.3 Assign foreign keys to establish associations between data, in accordance with organisational and task requirements 2.4 Use software functions and formulae to meet organisational and task requirements 2.5 Create password and access system according to organisational policies and procedures relating to data security 2.6 Access and use application help functions to overcome intermediate-level issues with database design and production, where required
3. Develop queries, forms and reports	3.1 Identify information output, database tables to be use and report layout, in accordance with task requirements 3.2 Identify data groupings, search and sort criteria, in accordance with task requirements 3.3 Run reports and queries to confirm that results and formulae produce required data 3.4 Modify reports to include or exclude additional requirements, where necessary
4. Test and finalise database	4.1 Populate database with sample dataset for testing, meeting organisational requirements for speed and accuracy 4.2 Assess and document effectiveness of data relationships, query forms and reports, assessing against organisational and task requirements 4.3 Document and address any errors in database design 4.4 Name and store database in accordance with organisational policies and procedures relating to data security, and exit the application without data loss or damage 4.5 Confirm database readiness with appropriate personnel

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Comprehends the main messages in texts of varying complexity
Writing	• 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
Oral Communication	• Confirms requirements using industry-specific language
Numeracy	• Extracts, interprets and comprehends routine formulae and digital application functions to establish data relationships
Navigate the world of work	• Adheres to organisational policies and procedures relevant to own role
Get the work done	• 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
BSBITA411 Design and develop relational databases	BSBITA401 Design databases	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

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Links

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Assessment Requirements for BSBITA411 Design and develop relational databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- produce a relational database, containing a minimum of THREE tables, which uses queries, reports and forms
- adhere to organisational requirements when inputting, amending and storing data, including using correct naming conventions
- adhere closely to task requirements, including:
  - following designated timelines
  - achieving required speed and accuracy
- communicate with relevant personnel to check database design against requirements
- distribute reports to appropriate personnel in appropriate format.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of advanced functions of available database applications
- Key features of organisational policies relating to transfer and security of data
- Key features of 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 analysis and design field of work and include access to:

- office equipment and resources – including business technology
- workplace documentation and resources
- industry database applications/platforms
- sample data.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITA611 Configure and optimise customer contact technology

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to establish optimal functionality and efficiency from customer contact technologies by configuring them to best suit organisational needs and strategies.

It applies to individuals working at a managerial or specialist level and within a customer contact environment where complex digital 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 capability of existing customer contact technology	1.1 Clearly identify the role of customer contact technology in customer contact operations 1.2 Identify the scope of the functions supplied by the existing digital technologies 1.3 Accurately align the capabilities of the existing technology to current and potential organisational needs and strategies

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ELEMENT	PERFORMANCE CRITERIA
2. Benchmark competing new technology applications	2.1 Identify specific operational needs that can be met by new and/or emerging digital technologies 2.2 Identify the range of functions and capabilities supplied by benchmarking competing technologies 2.3 Select critical features of competing technologies for analysis against organisational needs and strategies 2.4 Conduct an analysis of competing technologies using cost effective processes 2.5 Report on appropriate new technology by considering the analysis of critical features, and deliver report to appropriate personnel in accordance with organisational policies and procedures
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, ensuring compliance with organisational policies and procedures 3.5 Develop comprehensive testing program to ensure delivery and reliability of new configuration 3.6 Evaluate configuration against organisational strategies
4. Develop a customer contact strategy to optimise existing 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 and document a strategy for exploiting additional capacity and deliver to appropriate personnel 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, ensuring compliance with organisational policies and procedures

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and analyses complex textual information to verify requirements and enhance system and user capabilities
Writing	• Prepares structured documents using appropriate specialised vocabulary to convey complex ideas, strategies and recommendations specific to the target audience
Oral Communication	• Engages in discussions to establish requirements and presents relatively complex information clearly using appropriate language and non-verbal features
Numeracy	• Comprehends, analyses and manipulates mathematical information for critical review and to achieve optimal outcomes
Navigate the world of work	• Understands how own role contributes to the broader business and financial objectives of the organisation
Get the work done	• 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
BSBITA611 Configure and optimise customer contact technology	BSBITA601 Configure and optimise customer contact technology	Updates to elements, performance criteria and assessment requirements	Equivalent unit

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Links

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Assessment Requirements for BSBITA611 Configure and optimise customer contact technology

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- complete the analysis, benchmarking and configuration of new and existing customer contact technology
- develop and recommend an optimisation strategy for existing customer contact 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key principles of benchmarking
- Key principles of budgeting and cost benefit analysis
- Key principles of business case preparation
- Key features of organisational goals
- Key features of 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

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- Key sections of the operational budget and business plan relevant to customer contact technology implementation.
-

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 technology
- workplace information, reporting and data
- stakeholder feedback
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITB511 Establish and maintain a network of digital devices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to establish a network of digital devices in a workgroup context 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, in which they are required to apply broad knowledge of digital networks. They may be responsible for installing and maintaining the network, but they will work closely with technology 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 Identify current and anticipated network requirements, as well as related opportunities, in accordance with organisational policy and budgetary constraints

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Identify any potential incompatibilities between selected network and current organisational software applications, digital devices, and work practices 1.3 Obtain and install equipment in accordance with organisational requirements and manufacturers' instructions 1.4 Install software applications in accordance with organisational requirements and the manufacturers' instructions 1.5 Conduct research and document outcomes to demonstrate that the establishment of the 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 digital devices and software applications, in accordance with organisational policies and procedures 2.2 Respond to network problems and rectify minor faults in accordance with organisational requirements 2.3 Report major problems and consult technology experts in accordance with organisational policies and procedures 2.4 Identify opportunities for improvements to the network and deliver recommendations to appropriate personnel, in accordance with organisational policies and procedures
3. Assist and train network users	3.1 Identify gaps in workforce knowledge and expertise relating to use of the network 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies and interprets workplace texts, including organisational policies and technical instructions, to identify relevant information
Writing	• Maintains accurate records and produces reports and recommendations using formats, terminology and conventions specific to workplace requirements

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Oral Communication	• Explains issues and requirements clearly using appropriate vocabulary and non-verbal features • Obtains information using active listening and questioning skills
Numeracy	• Identifies and interprets numerical information within budgets
Navigate the world of work	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	• 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	• 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**
BSBITB511 Establish and maintain a network of digital devices	BSBITB501 Establish and maintain a workgroup computer network	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITB511 Establish and maintain a network of digital devices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- evaluate ability of several network solutions to meet current and future organisational needs
- select, install and maintain software applications and digital devices in accordance with organisational requirements and procedures
- document and present evidence of effectiveness of network
- identify and address network problems, escalating where necessary
- consult with information technology (IT) professionals to address high-level network issues
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of digital networking
- Key features of several current and emerging digital network solutions
- Key features of organisational policies and procedures relating to the tasks required
- Key features of organisational budget relevant to the tasks required
- Key features of software application licensing rights and responsibilities.

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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:

- office equipment
- networked digital devices
- case studies or, where possible, real situations
- relevant organisational policies, procedures, and strategies
- appropriate software applications.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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BSBITS411 Maintain and implement digital technology

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to maintain the effectiveness of digital technology in the workplace. It includes maintaining existing technology, planning for future technology requirements, and identifying opportunities to improve workplace effectiveness and efficiency by introducing new digital technologies.

It applies to individuals with a broad knowledge of digital business technologies who may be required to contribute well-developed skills in creating solutions to maintenance and upgrade issues with existing digital 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 existing digital technologies	1.1 Monitor and evaluate system effectiveness to ensure it meets organisational and system requirements 1.2 Use operating system, available software, web-based tools, and relevant applications to identify performance problems

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Maintain digital technologies according to organisational requirements by troubleshooting solutions to diagnose issues
2. Maintain security and functionality of data and digital technologies	2.1 Carry out system back-up procedure at regular intervals according to organisational and system requirements 2.2 Install and operate software and other digital applications in accordance with developers' and organisational requirements 2.3 Identify sources of risk to digital security in line with organisational policies and requirements 2.3 Maintain and update digital 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
3. Identify future technology requirements and opportunities	3.1 Identify available and upcoming digital technology solutions by accessing relevant sources of information 3.2 Assess existing digital technologies against newly available and upcoming digital technology solutions to determine future needs, opportunities, and priorities 3.3 Identify and select new digital technologies to achieve and maintain continuous organisational development in line with organisational strategies 3.4 Develop and implement improved digital technology systems based on feedback from clients and colleagues, in line with organisational policies and requirements 3.5 Obtain management and budget approval for new selected technologies

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Gathers, analyses and interprets a range of textual information from a variety of sources and identifies relevant information
Writing	• Produces texts of varying complexity using appropriate language and logical structure to record and convey information
Navigate the	• Complies with organisational policies and legal responsibilities

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world of work	related to own work
Get the work done	• 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**
BSBITS411 Maintain and implement digital technology	BSBITS401 Maintain business technology	Updates to title, application statement, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITS411 Maintain and implement digital technology

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify and resolve system issues using a range of digital diagnostic tools
- perform routine system maintenance, including carrying out back-up procedures and software/application installation
- identify a range of risks to digital security and steps required to minimise/eliminate such risk
- develop and implement improved digital technology systems, drawing on research of available and upcoming digital technology solutions.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features, capabilities, and limitations of current industry-accepted digital technology solutions
- Key features and limitations of existing organisational digital technologies, including software licences
- Key features of organisational policies and requirements related to digital security
- Key features of organisational commercial strategy relevant 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 information and communications technology – IT support field of work and include access to:

- case studies and, where possible, real situations
- office equipment and resources
- examples of technology maintenance and security procedures.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU111 Operate a personal digital device

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to start up and use a range of basic functions on a personal digital device.

It applies to individuals who perform a range of routine digital tasks in the various sectors of the business services industry and generally work under direct supervision.

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

Unit Sector

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. Activate personal digital device and access features	1.1 Activate personal digital device, and access or log on according to user procedures 1.2 Identify basic functions and features using system information 1.3 Customise desktop or application configuration, if necessary,

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ELEMENT	PERFORMANCE CRITERIA
	with assistance from appropriate persons 1.4 Access help functions as required
2. Navigate and organise file or application environment	2.1 Open, close and access features by selecting correct desktop or menu icons 2.2 Create shortcuts onto the desktop or menu, if necessary, with assistance from appropriate persons 2.3 Create folders/subfolders of files or applications (or similar) with suitable names for personal device 2.4 Download new applications (or similar), with assistance from appropriate persons 2.5 Rename and move folders/subfolders of files or applications (or similar) with suitable names 2.6 Use search functions to locate files or applications (or similar) 2.7 Remove files or applications (or similar) as required, with assistance from appropriate persons
3. Edit stored information	3.1 Open relevant file, document, application, or similar 3.2 Edit content of the file, document, application, or similar in accordance with simple instructions 3.3 Save changes to personal device
4. Shut down/deactivate personal digital device	4.1 Save and close all open applications 4.2 Shut down or deactivate personal digital device according to user procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises textual information within internal procedures and technical documents to determine and complete work requirements
Writing	• Inputs information using familiar text types and records numerical and textual information for file naming conventions
Oral Communication	• Asks simple questions and comprehends answers that contain short and explicit information

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Navigate the world of work	• Recognises and follows simple instructions
Interact with others	• Uses appropriate communication practices to seek guidance from more experienced work colleagues
Get the work done	• 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**
BSBITU111 Operate a personal digital device	BSBITU101 Operate a personal computer	Updates to title, application statement, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU111 Operate a personal digital device

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow user procedures to activate and access a personal digital device
- follow user procedures and system information when using the basic functions on a personal digital device, seeking assistance when necessary
- use desktop or menu icons and create shortcuts
- create and manipulate folders and subfolders
- update and save changes to files, documents, applications, or similar
- correctly shut down or deactivate applications and the device.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- User procedures for activating and accessing a personal digital device
- Key components of the digital system, including what each one does
- Key functions of the operating system
- Organisational conventions for naming files

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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
- device user and system information
- suitable workspace including a personal digital device.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU112 Develop keyboard skills

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop basic keyboard skills (across multiple devices/keyboard types) 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 workspace meets organisational and work health and safety (WHS) requirements for device operation, taking into account type of device/keyboard to be used
2. Identify and develop keyboard skills	2.1 Identify and apply keyboard functions for both alpha and numeric keyboard functions on both physical and digital keyboards

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Apply touch typing technique to complete a task 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Comprehends textual information in workplace documents to confirm work requirements • Checks own work to identify errors
Writing	• Enters and edits numerical and textual information according to a defined format
Navigate the world of work	• Complies with organisational requirements and meets expectations associated with own role
Get the work done	• 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
BSBITU112 Develop keyboard skills	BSBITU102 Develop keyboard skills	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU112 Develop keyboard skills

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow ergonomic and organisational and work health and safety (WHS) requirements
- use keyboard functions to enter alpha and numeric data on both physical and digital keyboards
- use touch-typing techniques to develop 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key aspects of organisational policies relating to work health and safety
- 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:

- relevant organisational policies and procedures
- relevant workplace documentation and resources
- suitable workplace including a personal digital device.

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Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU211 Produce digital text documents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to digitally produce word documents in a workplace context.

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 word processing software/applications 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. Prepare to produce documents	1.1 Adjust workspace, furniture and equipment to suit user ergonomic environments 1.2 Ensure workspace meets organisational work health and safety requirements for digital device operation, taking into account the type of device to be used 1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.4 Identify organisational and task requirements for document

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ELEMENT	PERFORMANCE CRITERIA
	layout and design 1.5 Select most appropriate word processing application to produce document, in accordance with available resources and organisational policies
2. Produce documents digitally	2.1 Format document using appropriate application functions to adjust layout to meet information requirements, in accordance with organisational style and presentation requirements 2.2 Use application features to identify and manipulate display options and controls 2.3 Use relevant help functions to overcome simple issues relating to document presentation and production
3. Finalise and present documents	3.1 Review and edit final document, and prepare for delivery in accordance with organisational and task requirements 3.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements 3.3 Name and store document appropriately in accordance with organisational requirements and exit application without information loss

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises textual information within organisational and task requirements to determine work requirements
Writing	• Records numerical and textual information in accordance with requirements of task
Oral Communication	• 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	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Seeks guidance from more experienced work colleagues
Get the work done	• Understands functions and features of specific digital applications

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	and uses these to perform work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU211 Produce digital text documents	BSBITU201 Produce simple word processed documents	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU211 Produce digital text documents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow correct ergonomic requirements and organisational policies and procedures
- produce digital documents that align to document purpose and appropriate to target audience
- adhere to organisational style manual when formatting documents
- use relevant help functions to rectify simple document issues
- produce document in appropriate format for review
- adhere to 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key elements of basic formatting styles and their effect on formatting, readability and appearance of documents
- Key functions of word processing applications
- Key features of organisational requirements for ergonomics
- Key features of organisational style and presentation 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:

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- device user information
- relevant organisational policies and procedures
- relevant workplace documentation and resources including a style guide and user manuals.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU212 Create and use spreadsheets

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to correctly create and use spreadsheets and charts using both cloud-based and non-cloud based spreadsheet applications.

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 spreadsheet software/applications 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. Prepare to produce spreadsheets	1.1 Adjust workspace, furniture and equipment to suit own ergonomic, work organisation and work health and safety (WHS) requirements 1.2 Identify task purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3 Identify specific task requirements, including layout and delivery timeline, and clarify with relevant personnel as required 1.4 Select most appropriate application to produce spreadsheet, in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with available resources and organisational policies
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 application 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 relevant help functions to overcome simple issues relating to 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 and present spreadsheets	4.1 Review and edit final spreadsheet and prepare for delivery in accordance with organisational and task requirements 4.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements 4.3 Name and store spreadsheet appropriately in accordance with organisational requirements and exit application without data loss

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises numerical and textual information within a range of resources to determine and complete work according to requirements
Writing	• Enters and amends routine data into relevant digital applications using a format appropriate to requirements
Oral Communication	• Listens to short and specific instructions and uses questions to clarify understanding • Uses simple mathematical language to confirm and convey

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	requirements
Numeracy	• Uses basic mathematical skills to create and apply spreadsheet formulae
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Recognises purpose of various communications directly relevant to own role and clarifies as required
Get the work done	• Uses key digital application features and functions in performing specific work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU212 Create and use spreadsheets	BSBITU202 Create and use spreadsheets	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU212 Create and use spreadsheets

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow correct ergonomic requirements and organisational policies and procedures
- produce spreadsheet documents that align to document purpose and appropriate to target audience
- consult with appropriate personnel as required
- adhere to organisational style and presentation requirements
- use relevant help functions to rectify simple document issues
- produce spreadsheet document in appropriate format for review, including ability to create and modify simple charts
- adhere to 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key elements of basic formatting styles appropriate to workplace documents
- Key functions of spreadsheet applications, both cloud-based and non-cloud based
- Key features of organisational requirements for ergonomic standards
- Key features of organisational guidelines on spreadsheet manipulation and processing
-

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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:

- industry technology
- relevant organisational policies and procedures
- relevant workplace documentation and resources including a style guide and user manuals
- industry software/applications for producing spreadsheets.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU213 Use digital technologies to communicate remotely

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to effectively identify, select and use available methods of digital communication in a workplace context. Such methods may include electronic mail (email), instant messaging and other similar applications/web-based platforms.

It applies to individuals who use digital technology to communicate with business stakeholders (including co-workers and customers). This will be particularly relevant to individuals in teams that work remotely. The individual will use a limited range of practical skills and fundamental knowledge in a defined context under direct supervision or with limited individual responsibility.

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

Unit Sector

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 methods for digital communication	1.1 Identify purpose for communication, intended audience and content of proposed communication (including whether it is commercially sensitive) 1.2 Identify available digital communication applications by accessing relevant sources of information and clarify with relevant

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ELEMENT	PERFORMANCE CRITERIA
	personnel as required 1.3 Select most appropriate application for communication in accordance with available resources and relevant organisational policies and procedures
2. Implement procedures to send and receive digital communications	2.1 Access application/platform for sending and receiving digital communications in accordance with organisational policies and procedures 2.2 Create outgoing digital communication, checking for accuracy and ensuring that any required attachments are prepared in accordance with organisational and technology provider requirements 2.3 Identify urgent, confidential, personal, suspicious or potentially dangerous email and take appropriate action, clarifying with relevant personnel as required 2.4 Access and determine most appropriate action in response to incoming digital communications, in accordance with organisational policies and procedures
3. Manage digital communications effectively	3.1 Set security levels and/or filters for incoming digital communications in accordance with organisational policies and procedures 3.2 Create plan for monitoring and maintaining digital communications across multiple applications/platforms in accordance with organisational policies and procedures 3.3 Store digital communications and/or attachments in accordance with policies and procedures 3.4 Empty inboxes and archive or permanently delete in accordance with organisational policies and procedures 3.5 Create methods for communicating electronically with targeted groups of stakeholders as relevant to organisation

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises textual information within different materials and interprets information to determine requirements as well as

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	confirming accuracy of content
Writing	• Records key information relevant to requirements and prepares simple correspondence using basic punctuation, text and correct spelling
Oral Communication	• Obtains information through listening and questioning and uses clear and appropriate language suitable to audience
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	• Recognises and responds to routine problems in context of own work

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU213 Use digital technologies to communicate remotely	BSBITU203 Communicate electronically	Updates to title, application statement, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU213 Use digital technologies to communicate remotely

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify suitable methods for digital communication in the context of the purpose and content of the proposed communication
- follow organisational and technology provider requirements when communicating electronically across multiple digital applications/platforms, including in relation to security of communications
- follow organisational policy and procedures when managing all aspects of digital communication, including by storing, filing and archiving/deleting inbound communications
- communicate electronically with targeted groups of colleagues, clients or similar as relevant to organisation.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of existing and emerging methods of digital communication, including strengths and limitations of each
- Key features of relevant industry practice relating to digital communication etiquette in a workplace setting
- Key features of commercial sensitivities in relation to knowledge management
- Key features of relevant organisational policies and procedures relating to the use of digital 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 information and communications technology – IT use field of work and include access to:

- industry technology
- relevant organisational policies and procedures
- relevant workplace documentation and resources
- industry applications/platforms for communicating digitally.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to remove reference to retired standard.
Release 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 operating in a range of environments who are required to enter text and data with speed and accuracy. Individuals may provide administrative support within an organisation, 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. Use safe work practices	1.1 Adjust workspace, furniture and equipment to suit ergonomic requirements

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ELEMENT	PERFORMANCE CRITERIA
	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 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 digital 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	BSBITU307	Updated to remove	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
keyboarding speed and accuracy Release 2	Develop keyboarding speed and accuracy Release 1	reference to retired standard	

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to remove reference to retired standard.
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, ergonomic, and work health and safety requirements
- complete a minimum of two 5-minute keyboarding speed and accuracy timings with at least 98% accuracy
- accurately proofread and amend 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:

- relevant workplace documentation, including organisational policies and procedures

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- relevant legislation
- workplace resources, including industry software packages.

Assessment materials used for 5-minute keyboarding speed and accuracy timings must adhere to the following guidelines.

Subject

The subject of the test copy may be of a business or social nature.

Style

The test material must consist of continuous text without headings, enumerations or formatting features.

Syllabic intensity

The average syllabic intensity of the test material must range between 1.4 and 1.6 syllables per dictionary word.

Technical words, infrequently used words, commonly used words

The test material must not contain an unusually high proportion of highly technical, infrequently used words or commonly used words.

Numbers and signs

The test material may include numbers, signs and uppercase words, provided that they do not constitute more than one per cent of the total number of words.

Title

If the passage has a title, it does not form part of the test.

Length

The test material must be long enough to enable the individual to continue keying in previously unseen material for the duration of the test.

Warm up exercise

Individuals must have the opportunity to use a warm-up exercise.

Corrections

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The automatic correction function may be used when completing a timing using a software package. Spell check cannot be used to correct errors at the completion of a timing.

On successful completion of this unit of competency, individuals may be issued with a speed and accuracy statement by a qualified workplace assessor or trainer.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU309 Produce desktop published documents

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to correct typographical error
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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
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	Description

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	Criteria	
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 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 Release 2	BSBITU309 Produce desktop published documents Release 1	Updated to correct typographical error	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to correct typographical error
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.

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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:

- 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU311 Use simple relational databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to use simple two-table relational databases with reports and queries, for storage and retrieval of information.

It applies to individuals that may provide administrative support and analysis within an enterprise, or may be independently responsible for storage, retrieval and simple analysis 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 Plan a simple one-to-one relational database, 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 Create a relationship between the two tables by assigning a

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ELEMENT	PERFORMANCE CRITERIA
	foreign key 1.5 Modify table layout and field attributes as required 1.6 Check and amend data entered, in accordance with organisational and task requirements
2. Create reports and queries	2.1 Identify information output, database tables to be used and report layout, in accordance with task requirements 2.2 Identify data groupings, search and sort criteria, in accordance with task requirements 2.3 Run reports and queries to check that results and formulae provide the required data 2.4 Modify reports to include or exclude additional requirements, where necessary
3. Use database	3.1 Ensure data input meets designated timelines and organisational requirements for speed and accuracy 3.2 Use help functions to overcome simple issues with database design and production 3.3 Preview, adjust and produce 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 personnel in a suitable format

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises and interprets textual and numerical information to determine and confirm tasks are completed as per requirements
Writing	• Inputs numerical and key reporting information when creating and querying simple relational databases, and uses standard naming conventions and format to organise data
Numeracy	• Uses mathematical equations to create simple relational database queries and formulae

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Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	• Plans, organises and completes 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**
BSBITU311 Use simple relational databases	BSBITU301 Create and use databases	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU311 Use simple relational databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- 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 relational databases including:
  - reports and queries
- adhere to designated timelines
- name and store data accurately and appropriately
- distribute reports to appropriate personnel in appropriate format.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features organisational policies relating to transfer and security of data
- Key features of 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 applications/platforms.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU312 Create electronic presentations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to design and produce electronic slide presentations using various applications and platforms.

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 (including furniture and equipment) in accordance with ergonomic requirements 1.2 Identify purpose, audience and mode of presentation in consultation with content author or presenter 1.3 Identify organisational and task requirements relating to supporting documents and equipment 1.4 Select most appropriate application or platform to produce presentation, in accordance with available resources and

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ELEMENT	PERFORMANCE CRITERIA
	organisational policies
2. Create presentation	2.1 Plan and prepare slides, notes and handouts according to organisational and task requirements and image and style requirements 2.2 Use application 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 application features to streamline and customise presentation for different audiences 2.5 Prepare presentation within designated timeline 2.6 Use relevant help functions to overcome issues relating to presentation creation, if necessary
3. Finalise presentation	3.1 Check presentation for spelling and consistency in presentation features and style, in accordance with task requirements 3.2 Prepare presentation materials for delivery in accordance with presenter or audience requirements 3.3 Name and store presentation appropriately, in accordance with organisational requirements and exit application without information loss

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Evaluates and integrates information and ideas to construct meaning in an effort to design and create a presentation
Writing	• Communicates relationships between ideas and information in a style appropriate to audience and purpose in accordance with organisational and task requirements
Oral Communication	• Listens to discussions and participates in exchange of information to choose appropriate actions to create presentation
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role

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Interact with others	• Collaborates with others to achieve joint outcomes
Get the work done	• 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**
BSBITU312 Create electronic presentations	BSBITU302 Create electronic presentations	Updated unit elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU312 Create electronic presentations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow correct ergonomic requirements and organisational policies and procedures
- produce electronic presentations that align to task purpose and are appropriate to target audience
- adhere closely to task requirements and organisational policies and procedures relating to:
  - following designated timelines
  - consistency of design and layout
  - editing and style requirements
- use relevant help functions to rectify presentation issues
- produce presentation in appropriate format for review
- communicate effectively with personnel
- store presentation in accordance with organisation policies and procedures relating to data security.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key provisions of relevant legislation, standards and codes that affect aspects of business operations
- Key elements of design features and their effect on the readability and appearance of electronic presentations
- Key functions of relevant applications for producing electronic presentations
- Key features of organisational requirements for ergonomics

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- Key features of organisational style and presentation 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 materials
- relevant digital applications
- examples of electronic presentations
- relevant organisational policies and procedures
- relevant workplace documentation and resources including style guide.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation frameworks and/or standards.

Links

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

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BSBITU313 Design and produce digital text documents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to digitally design and develop text-based documents using advanced features of word processing applications/platforms.

It applies to individuals who possess fundamental skills in digital device operation, and basic skills in operation of word processing applications. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own digital 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 documents	1.1 Adjust workspace, furniture and equipment to suit user ergonomic environments 1.2 Ensure workspace meets organisational requirements related to work health and safety, and energy and resource conservation, taking into account the type of digital device to be used 1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image 1.5 Select most appropriate word processing application to produce document, in accordance with available resources and organisational policies
2. Design documents digitally	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 available application functions to ensure consistency of design and layout, adhering to organisational and task requirements 2.4 Insert a standard table into document, changing cells, columns, and rows as necessary to meet information requirements 2.5 Insert and format visual elements (including, for example, images or icons) to meet organisational and task requirements for style and layout
3. Produce text documents digitally	3.1 Use intermediate-level application functions to enable efficient production of digital text documents 3.2 Enter or import, and edit text and other data to meet task requirements 3.3 Preview, adjust and prepare documents for delivery in accordance with organisational and task requirements 3.4 Name and store document, in accordance with organisational requirements and exit application without information loss/damage 3.5 Deliver document within designated timelines and organisational requirements for speed and accuracy 3.6 Use relevant help functions to overcome intermediate issues with document design and production

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements

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Writing	• 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	• Uses specific and direct language, and listening and questioning techniques to clarify requirements
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Collaborates with others to achieve joint outcomes
Get the work done	• Uses advanced features within digital applications to address routine and complex work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU313 Design and produce digital text documents	BSBITU303 Design and produce text documents	Updated title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU313 Design and produce digital text documents

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow correct ergonomic and conservation requirements, and relevant organisational policies and procedures
- design and produce digital text documents that align to document purpose and are appropriate to target audience
- 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 application features for intermediate-level document design
- communicate effectively with relevant personnel
- overcome problems by referring to application help functions.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key elements of intermediate-level formatting styles and their impact on formatting, readability and appearance of documents
- Key strengths and limitations of various word processing applications
- Key features of organisational requirements for ergonomics, work periods and breaks, and conservation techniques

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- Key features relating to purpose and contents of 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:

- office equipment and resources
- relevant word processing applications
- relevant organisational policies and procedures
- examples of correctly formatted text documents
- relevant workplace documentation and resources including style guides and user manuals.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU314 Design and produce spreadsheets

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop spreadsheets through the use of both cloud-based and non-cloud based spreadsheet applications.

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. These individuals are generally required to have intermediate knowledge and understanding of a number of spreadsheet applications.

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

Unit Sector

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 Identify spreadsheet task purpose and audience 1.2 Identify task requirements in relation to data entry, storage, output, timeline and presentation format 1.3 Select most appropriate application to produce spreadsheet, in accordance with available resources and organisational policies
2. Plan spreadsheet	2.1 Ensure spreadsheet design suits purpose, audience and

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ELEMENT	PERFORMANCE CRITERIA
design	information requirements of task 2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout 2.3 Use available application functions to ensure consistency of design and layout, adhering to organisational and task requirements
3. Create spreadsheet	3.1 Enter data, check and amend to maintain consistency of design and layout, in accordance with organisational and task requirements 3.2 Format spreadsheet using application 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 relevant help functions to overcome intermediate-level issues with spreadsheet design and production
4. Produce intermediate-level charts	4.1 Select chart type and design that that offers analysis 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, adhering to organisational and task requirements
5. Finalise and present spreadsheets	5.1 Review and edit final spreadsheet and any accompanying charts, and prepare for delivery in accordance with task requirements 5.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements for speed and accuracy 5.3 Name and store spreadsheet appropriately in accordance with organisational requirements and exit application without data loss/damage

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

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Skill	Description
Reading	• Recognises and interprets numerical and textual information to determine organisational and task requirements
Writing	• 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	• Participates in exchange of information to determine whether formulae utilised produce result required
Numeracy	• Uses mathematical equations to create simple formulae and validate numerical data
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Collaborates with others to achieve joint outcomes
Get the work done	• Uses advanced features within relevant digital applications to address routine and complex work tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBITU314 Design and produce spreadsheets	BSBITU304 Produce spreadsheets	Updated title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU314 Design and produce spreadsheets

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- follow correct ergonomic, conservation requirements and relevant organisational and statutory requirements
- produce spreadsheet documents that align to document purpose and appropriate to target audience
- design spreadsheets that address a range of data and organisational requirements
- use software functions, graphics and support materials to create spreadsheets that adhere to organisational requirements relating to style and presentation
- use relevant help functions to rectify intermediate-level document issues
- produce spreadsheet document in appropriate format for review, including ability to create and modify intermediate-level charts that analyse the dataset
- adhere to designated timelines and requirements for high accuracy.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key elements of intermediate-level formatting styles appropriate to workplace documents
- Key functions of spreadsheet applications, both cloud-based and non-cloud based
- Key features of organisational guidelines on spreadsheet design and use
- Key features of organisational requirements for ergonomic standards, work periods and breaks, and conservation 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 information and communications technology – IT use field of work and include access to:

- industry software/applications for producing spreadsheets
- digital device user information
- relevant legislation and codes of practice
- relevant organisational policies and procedures
- relevant workplace documentation and resources, including style guide.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU315 Purchase goods and services online

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to use e-commerce to procure goods and services in a business context. This includes the ability to undertake a range of online buy-side transactions, including banking, and purchasing 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 engaging in e-commerce 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 suitable suppliers online	1.1 Identify purpose for goods or services to be procured 1.2 Conduct research to identify potential suppliers of required goods/services by accessing a range of digital sources/marketplaces 1.3 Assess service provider confidentiality, security and privacy facilities in accordance with individual and organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Assess potential products/services for authenticity 1.5 Select most appropriate supplier of goods/services, in accordance with organisational budget, policies, and procedures
2. Procure goods or services online	2.1 Engage with supplier in a professional and appropriate manner via the relevant online platform 2.2 Identify risks in the digital transfer of information and take steps to ensure that information is secured in accordance with organisational requirements 2.3 Place purchase order with the relevant supplier using appropriate online functions to obtain required goods/services 2.4 Report any difficulties in accessing or using online facilities to the supplier as required 2.5 Make payment or receive invoice to complete transaction in accordance with terms of online transaction and organisational policies and procedures
3. Maintain records of online transactions	3.1 Maintain banking and other 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 3.3 Review goods/services obtained, assessing quality, timeliness, and level of customer service

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Accesses a range of online information and contextualises to transaction requirements
Reading	• Recognises and interprets numerical information within online content and organisational requirements to establish and complete required tasks and determine quality of content
Writing	• Ensures specific and relevant language is used to communicate required information, and information is accurately maintained

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Oral Communication	• Articulates requirements clearly using listening and questioning techniques to clarify and confirm understanding • Delivers specific and factual information appropriate to audience and environment
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	• 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**
BSBITU315 Purchase goods and services online	BSBITU305 Conduct online transactions	Updates to unit title, application statement, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU315 Purchase goods and services online

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- research and assess potential suppliers using a range of sources of information, whilst adhering to organisational requirements
- engage a supplier online in a professional and appropriate manner in accordance with organisational policies and procedures
- identify and mitigate risks associated with conducting business online
- adhere to organisational requirements when performing online transactions including:
  - reporting faults to supplier
  - checking accuracy of products/services delivered
- maintain accurate records according to organisational policy and procedures and reporting to relevant personnel
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key provisions of relevant legislation that affect aspects of business operations
- Key features of organisational policies and procedures relating to use of internet and online purchasing
- Key features of organisational policies and procedures relating to the security of electronic information (including, for example, financial information)
- Key features of legal and ethical requirements relating to a range of online transactions.

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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 applications/platforms for conducting e-commerce
- relevant legislation
- relevant organisational policies and procedures.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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BSBITU422 Use digital technologies to collaborate in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to understand the fundamentals of using digital technologies to collaborate in a workplace context, including working as part of a remote team. It involves undertaking a basic review of organisational processes to identify opportunities for using digital technologies to complete work tasks more efficiently and effectively.

It applies to individuals who use problem-solving skills and take responsibility for adopting and promoting approaches to improve organisational operations, particularly relating to the use of digital technologies.

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

Unit Sector

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. Review existing digital technology use in the business	1.1 Identify current collaborative ways of working, particularly relating to the use of technology to support collaboration 1.2 Assess performance of current ways of working against organisational strategies and objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Collate information collected through review and provide to relevant personnel as required
2. Identify opportunities to implement digital technologies for workplace collaboration	2.1 Identify available digital technologies by accessing relevant sources of information 2.2 Seek assistance from specialist advisors as required to determine relevant digital applications and specific information related to each 2.3 Assess existing collaborative methods against available and existing digital technologies to determine opportunities and priorities taking into account any associated costs and risks 2.4 Prepare a business case for implementing new digital solutions to support collaboration and seek approval where required
3. Implement and use digital technologies to collaborate in the workplace	3.1 Develop a plan to introduce new collaborative technologies, by assessing short-term and longer-term goals business objectives 3.2 Communicate and promote key features of the plan to others, referring to organisational strategies where relevant 3.3 Organise training and coaching for relevant personnel to maximise uptake and effectiveness

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Actively reinforces workplace learning by encouraging personnel to expand their digital literacy
Reading	• Organises, evaluates and critiques information from a wide variety of textual material
Writing	• Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations
Oral communication	• Uses appropriate, detailed and clear language to address key personnel and disseminate information • Uses listening and questioning skills to confirm understanding of requirements
Navigate the	• Adheres to organisational policies and procedures and considers own role for its contribution to broader workplace goals

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world of work	
Interact with 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 • May seek expert guidance of others in specific areas
Get the work done	• Applies problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action • Uses both formal and informal processes to monitor implementation of solutions and reflect on outcomes for future improvements • 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**
BSBITU422 Use digital technologies to collaborate in the workplace	BSBSMB412 Introduce cloud computing into business operations	Updates to title, application statement, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBITU422 Use digital technologies to collaborate in the workplace

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- review business use of technology for collaboration and identify opportunities, priorities and risks associated with adopting new technologies, in accordance with organisational strategies
- collect, analyse and present relevant information about digital applications
- create and present a business case to appropriate personnel for adopting new collaborative digital technologies
- develop and communicate a plan to implement new ways of working collaboratively using digital technologies.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key fundamentals of digital applications, including key terms and concepts
- Key features of organisational policies and requirements related to digital security
- Key features of organisational commercial strategy relevant to digital technologies
- Key sources of information about digital applications, and options specific to the business.

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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- business equipment and resources
- business technology
- relevant legislation, regulations, standards and codes
- relevant organisational policies and procedures
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBITU501 Conduct data analysis

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to identify and analyse numerical datasets from a range of sources. This unit also describes the necessary skills and knowledge to report findings of data analysis.

This unit applies to individuals who are required to analyse numerical datasets and deduce findings as part of their job roles. Individuals that undertake this unit are typically in roles in which they are required to analyse data and communicate trends and/or make recommendations.

No licensing, legislative, regulatory 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 background to reliable sources of data	1.1 Evaluate the importance of large and dynamic data sets for business insight and decision making 1.2 Evaluate the business value of large and dynamic data sets 1.3 Document and describe the interdisciplinary, social and industrial contexts of data impacting organisation 1.4 Evaluate reliability of potential sources, considering timeliness,

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ELEMENT	PERFORMANCE CRITERIA
	authority, audience, relevance and potential for bias 1.5 Access selected sources in accordance with the relevant organisational policy
2. Analyse and synthesise numerical datasets	2.1 Select methods of numerical data analysis in accordance with relevant industry standards, precedents and techniques 2.2 Compare and contrast how structured and unstructured data is stored and accessed 2.3 Evaluate the importance of real-time data access in exploiting large data sets 2.4 Identify trends and draw inferences in accordance with relevant industry standards, precedents and techniques
3. Produce meaningful outputs	3.1 Determine which trends and inferences are relevant in line with the purpose of the analysis and the relevant organisational strategies 3.2 Identify appropriate methods of reporting, considering the intended audience and relevant organisational requirements 3.3 Produce output that is clear and concise within a pre-determined timeframe 3.4 Circulate to appropriate stakeholders in accordance with relevant organisational policy

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Researches, analyses and evaluates textual information, from a wide range of sources, to identify information relevant to numerical data analysis
Writing	• Develops complex plans and strategies using language and format appropriate to the audience and purpose
Oral Communication	• Uses a range of techniques to communicate complex concepts
Numeracy	• Analyses and synthesises highly embedded mathematical information while testing and analysing results

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Navigate the world of work	• 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	• Actively identifies the requirements of important communication exchanges, selecting appropriate channel, format, tone and content to suit purpose and audience
Get the work done	• Uses logical processes to plan, implement and monitor learning in the workplace • Evaluates outcomes of data analysis processes to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBITU501 Conduct data analysis Release 1	Not applicable	New unit	No equivalent unit

Links

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

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Assessment Requirements for BSBITU501 Conduct data analysis

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify, evaluate and safely access sources of information
- analyse complex numerical datasets that is based on:
  - analysis of the organisation's objectives, existing processes and resources
  - research of existing best practice in industry
- articulate trends and inferences drawn from numerical data and how they may apply in an organisational context, in such a manner that is understandable to a diverse audience group.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of an information source and its reliability for organisational purposes
- key details of datasets and techniques for synthesising complex numerical information
- key features of existing organisational policies relating to:
  - the access of information
  - the recording and reporting of information
- key features of industry standards and techniques relating to data analysis
- key legislative requirements relating to workplace 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 Information and Communications Technology – IT Use field of work and include access to:

- office equipment, technology, software and consumables required to analyse data
- case studies and, where possible, real situations
- organisational operational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation 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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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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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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BSBLDR511 Develop and use emotional intelligence

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

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 are required to identify, analyse, synthesise and act on information from a range of sources and who deal with unpredictable problems as part of their job role. 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	1.1 Identify and use evaluation criteria to determine own emotional

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ELEMENT	PERFORMANCE CRITERIA
own emotions on others in the workplace	strengths and weaknesses 1.2 Identify personal stressors and own emotional states related to the workplace 1.3 Analyse and document potential emotional triggers in workplace situations which may require determine appropriate emotional responses 1.4 Evaluate the impact of own 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 address the emotional strengths and weaknesses of others	2.1 Respond to the emotional states of co-workers and assess emotional cues 2.2 Develop a plan for identifying and responding appropriately to a range of cultural expressions of emotions 2.3 Apply techniques to demonstrate flexibility and adaptability in dealing with others 2.4 Demonstrate consideration of the emotions of others when making decisions
3. Promote the development of emotional intelligence in others	3.1 Create 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 Develop and implement plans to encourage the self-management of emotions in others 3.4 Develop and implement plans to 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 Identify opportunities to utilise emotional intelligence to increase team performance in line with organisational objectives 4.2 Encourage a positive, inclusive emotional climate in the workplace 4.3 Use the strengths of workgroup members to achieve team and/or organisational objectives

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Identifies and uses strategies to improve own emotional intelligence
Oral communication	• Uses appropriate language and nonverbal features to present information and seek feedback • Uses listening and questioning skills to elicit the views of others and to clarify or confirm understanding
Interact with others	• 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 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	• 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
BSBLDR511 Develop and use emotional intelligence	BSBLDR501 Develop and use emotional intelligence	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBLDR511 Develop and use emotional intelligence

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Performance Evidence

Evidence of the ability to:

- conduct an analysis to identify own emotional strengths, weaknesses, stressors, emotional states and triggers, incorporating feedback from others
- identify workplace situations and environments that may trigger an emotional response
- model behaviours that demonstrate management of emotions
- recognise the impact that cultural behaviours and beliefs may have on workplace interactions
- recognise and respond to the emotional states of others
- use emotional intelligence of self and others to enhance team performance
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of emotional intelligence principles and strategies
- Key elements of the relationship between emotionally effective people and the attainment of business objectives
- Key strategies for communicating with a diverse workforce which has varying cultural expressions of emotion
- Key features of emotional intelligence in the context of building workplace relationships.

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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 or, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLDR513 Communicate with influence

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to present and negotiate persuasively, lead and participate in meetings and make presentations to customers, clients and other key stakeholders.

It applies to managers and leaders who are required to identify, analyse, synthesise and act on information from a range of sources, and who deal with unpredictable problems as part of their job role. 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 authority to present material on behalf of a business, in accordance with organisational policies and procedures 1.2 Identify information that may be subject to confidentiality and manage appropriately 1.3 Identify information needs of audience and prepare a position in line with purpose of communication

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Use language, written or verbal, that is appropriate for the audience 1.5 Use active listening to seek stakeholder and intra-organisational input to achieve a balanced exchange of views
2. Present and negotiate persuasively	2.1 Map stakeholder landscape, identifying key individuals and target groups in line with organisational objectives 2.2 Prepare realistic positions and supporting arguments in advance of the likely expectations and tactics of others 2.3 Acknowledge differences of opinion to encourage the rigorous examination of all options 2.4 Use a variety of communication styles to present business positions to best effect 2.5 Seek mutually beneficial solutions by establishing areas of common ground and potential compromise 2.6 Keep negotiations focused on key issues and moving forward towards a final resolution
3. Participate in and lead meetings effectively	3.1 Identify the need for any meetings and schedule meetings in response to the need 3.2 Prepare materials relating to key issues and disseminate in advance 3.3 Develop and circulate an agenda, and use efficient, inclusive meeting procedures to maximise participation and maintain order 3.4 Achieve agreed outcomes in the available time by co-operating with and seeking consensus and compromise 3.5 Summarise outcomes of meetings for action and distribute to stakeholders promptly, as required
4. Make presentations at meetings, forums and conferences	4.1 Identify appropriate forums to present business positions, in line with organisational objectives 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, honestly, and in accordance with organisational policies

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Writing	• 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	• 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	• Understands the implications of legal and ethical responsibilities to maintain confidentiality
Interact with others	• 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	• 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

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLDR513 Communicate with influence	BSBLDR503 Communicate with influence	Updates to elements, performance criteria and assessment requirements	Equivalent unit

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Links

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Assessment Requirements for BSBLDR513 Communicate with influence

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- review organisational policies to determine information that may be subject to confidentiality
- negotiate and present persuasively
- identify relevant stakeholder groups
- communicate clearly with key stakeholders 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 fora for presentations
  - presenting reliable information
  - designing the presentation to meet the needs of the audience
  - answering questions clearly and concisely.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key industry, media and government organisations, events and communication channels that are relevant to the organisation
- Key principles of cross-cultural communication
- Key features of various techniques for negotiation, mediation, conflict resolution and incident de-escalation

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- Key features of structured and inclusive meeting procedures
- Key features of relevant organisational objectives
- Key features of relevant organisational policies and procedures, including in relation to the confidentiality of information.

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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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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. Communicate to influence relevant individuals and stakeholders	1.1 Generate trust, confidence and support from relevant stakeholders by demonstrating a high standard of personal 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	4.1 Identify and address relevant organisational policies and

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ELEMENT	PERFORMANCE CRITERIA
partnership program	procedures in partnership plans 4.2 Identify and incorporate relevant legal requirements into planning 4.3 Form partnerships using collaborative and consultative processes 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

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		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 • 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	BSBREL701A Develop and cultivate collaborative partnerships and 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 BSBLDR803 Develop and cultivate collaborative partnerships and relationships

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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.

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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 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment requirements
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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

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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
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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLED401 Develop teams and individuals Release 2	BSBLED401 Develop teams and individuals Release 1	Updated to clarify assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBLED401 Develop teams and individuals

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify assessment requirements
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.

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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
- learning and development plans, policies and procedures
- case studies and, where available, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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

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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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BSBLIB201 Assist with circulation services

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to process loan transactions and respond to circulation and lending enquiries from customers.

It applies to individuals working under supervision within established policies and procedures, in frontline library and information services roles.

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

Unit Sector

Library – Information 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 information to customers	1.1 Provide current and accurate information to customers, using circulation and lending systems and procedures 1.2 Assist customers with basic enquiries 1.3 Develop own expertise in relation to information and use of self-service systems in libraries 1.4 Respond to customer enquiries promptly or refer to appropriate persons

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ELEMENT	PERFORMANCE CRITERIA
2 Process loan transactions	2.1 Check and process customer registration details according to organisational procedures 2.2 Complete transactions according to circulation services policies and procedures and customer service standards 2.3 Deal with competing demands for service tactfully and helpfully 2.4 Complete checking and processing of material according to organisational requirements
3 Process financial transactions	3.1 Conduct financial transactions according to organisational procedures 3.2 Balance income to receipts 3.3 Note irregularities and take appropriate action promptly

Foundation Skills

This section describes language, 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	• Interprets, consolidates and checks completeness and accuracy of information and data
Writing	1.1, 2.1, 2.2, 2.4, 3.3	• Produces familiar text types using simple vocabulary, grammatical structures and conventions
Oral Communication	1.1, 1.2, 1.4, 2.3	• Selects and uses appropriate words to establish and maintain effective spoken communication with customers and colleagues
Numeracy	3.1-3.3	• Performs mathematical calculations to accurately process payments
Navigate the world of work	1.1, 1.3, 1.4, 2.1, 2.2, 2.4, 3.1	• Develops and maintains own knowledge of circulation and lending systems relevant to job role • Understands roles and responsibilities and makes basic decisions on work completion parameters • Seeks clarification or assistance when required
Interact with others	1.1, 1.2, 1.4, 2.3	• Follows accepted communication practices and protocols, adjusting personal communication style in response to work context and customer needs

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Get the work done	1.4, 2.2, 2.3, 3.1-3.3	• Makes low-impact decisions around immediate, clearly defined tasks • Automatically implements standard procedures for routine decisions in response to familiar problems • Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB201 Assist with circulation services	CULINS201A Assist with circulation services	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB201 Assist with circulation services

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- apply knowledge of circulation services processing and procedures to complete several customer transactions and/or enquiries
- process loans and returns within required time constraints and according to procedures
- communicate courteously and effectively 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 important features of circulation systems and technology in different industry contexts
- describe relevant systems, policies and procedures for:
  - customer service
  - handling money and security
  - inter-library loans and lending
  - pre-paid services
- describe key principles underpinning operation of manual and automated circulation systems, including self-service systems
- discuss security protocols for:
  - clients
  - money
  - staff
  - theft
  - vandalism.

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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 Library – Information Services field of work and include access to:

- current industry systems and equipment for processing loan and return transactions
- an online catalogue
- relevant policies and procedures regarding manual and automated loan processing systems
- special purpose tools, equipment, materials and relevant industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB202 Process information resource orders

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to determine, order and receive orders for information resources according to organisational acquisition procedures.

It applies to individuals undertaking straightforward administrative and organisational functions in a library or information services context, generally under supervision, within established procedures.

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

Unit Sector

Library – Information 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 Determine ordering requirements	1.1 Search for and verify bibliographic details for requested information resources within required timeframes 1.2 Check availability and estimated cost of requested information resources 1.3 Select suppliers according to organisational guidelines 1.4 Check supplier performance to inform selection, and report performance problems to appropriate colleagues

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ELEMENT	PERFORMANCE CRITERIA
2 Order information resources	2.1 Create and despatch order records according to organisational procedures 2.2 Prioritise urgent orders and action to expedite receipt 2.3 Check progress of orders and take appropriate follow-up action where necessary 2.4 Update records of ordered material to reflect changes in availability or price according to organisational procedure 2.5 Refer problems with processing orders to appropriate personnel as required
3 Receive information resources	3.1 Accept materials and complete checking processes against invoice and order details 3.2 Process invoices for payment or raise queries with suppliers 3.3 Follow organisational procedures when making claims to suppliers for missing, damaged or incorrect material 3.4 Record details of material received according to organisational procedures 3.5 Complete physical processing tasks for received items as required 3.6 Sort received items in priority order ready for cataloguing 3.7 Update relevant records and note irregularities

Foundation Skills

This section describes language, 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, 3.4, 3.6, 3.7	• Identifies and interprets relevant information and ideas within familiar contexts such as the checking process and interpreting order information
Writing	1.1, 1.3, 2.1-2.4, 3.1-3.4, 3.7	• Conveys intended meaning on familiar topics for a limited range of purposes and audiences, such as completing order information and corresponding with colleagues and suppliers
Oral	1.4, 2.3, 2.5, 3.2, 3.3	• Interacts effectively in verbal exchanges, using active

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Communication		listening and questioning to convey and clarify information
Numeracy	1.2, 2.1, 2.4, 3.1-3.4, 3.7	• Performs basic mathematical calculations to interpret orders and invoices and other numeric data
Navigate the world of work	1.1, 1.3, 1.4, 2.1, 2.4, 3.3, 3.4	• Understands roles and responsibilities and follows workplace procedures • Seeks clarification or assistance when required • Completes work activities in a timely fashion
Interact with others	1.4, 2.3, 2.5, 3.2, 3.3	• Uses a limited range of accepted practices for communicating in a work environment
Get the work done	1.1, 1.4, 2.2, 2.3, 2.5, 3.2, 3.5-3.7	• Plans and implements routine tasks and workload making limited decisions on sequencing and timing • Makes low-impact decisions around immediate, clearly defined tasks • Automatically implements standard procedures for routine decisions in response to familiar problems • Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB202 Process information resource orders	CULINS202A Process information resource orders	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business Services Training Package.	Equivalent unit

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Assessment Requirements for BSBLIB202 Process information resource orders

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- accurately process orders for information resources
- apply knowledge of bibliographic and catalogue record components to determine order requirements
- process multiple orders for different types of resources
- work within realistic industry 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:

- explain how to interpret organisational procedures, including systems for determining availability of resources
- describe a range of available print and electronic information resources
- describe typical ordering processes and systems used by information services providers.

Assessment Conditions

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

- use of industry-current ordering systems and databases
- access to relevant policies and procedures documents, including:
  - automated resource ordering systems
  - special purpose tools, equipment, materials

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- relevant industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB301 Catalogue objects into collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to organise and catalogue collection objects for future access.

It applies to individuals who work under some supervision and have responsibility for ensuring work is of a high standard and completed according to established policies and procedures.

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

Unit Sector

Library – Collection 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 Prepare to catalogue objects	1.1 Discuss purpose and benefits of cataloguing collection objects with relevant personnel 1.2 Become familiar with relevant organisational policy documents 1.3 Use cataloguing tools to complete registration worksheets and establish supplementary files 1.4 Establish digital files relating to collections

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ELEMENT	PERFORMANCE CRITERIA
2 Process objects	2.1 Enter objects into organisational registration book or collections database, observing relevant policies and procedures 2.2 Assign and fix registration numbers to objects 2.3 Enter information from registration worksheets into catalogues 2.4 Update catalogue information observing organisational policies and processes 2.5 Seek assistance from colleagues as required
3 Contribute to reviews of workplace procedures	3.1 Act on feedback from relevant personnel to improve own performance 3.2 Discuss aspects of cataloguing procedures that could be improved with relevant personnel 3.3 Participate in workplace reviews 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, 2.1, 2.4, 3.2	• Interprets specific information to determine and complete work requirements • Identifies key facts in a range of data, and reviews for accuracy
Writing	2.1-2.4	• Completes workplace documentation accurately and legibly using technically specific language in line with industry and organisational requirements
Oral Communication	1.1, 2.5, 3.2, 3.3	• Participates in verbal exchanges using appropriate tone and language • Uses techniques such as listening, questioning and paraphrasing to confirm understanding
Numeracy	1.1, 1.3, 2.2	• Interprets and applies numerical sequencing and basic mathematics relating to measurements
Navigate the world of work	1.2, 2.1, 2.4, 2.5, 3.3	• Understands roles and responsibilities in relation to cataloguing tasks making basic decisions on work completion parameters and seeking assistance when necessary

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		• Recognises and follows relevant explicit and implicit protocols, policies and procedures and meets expectations associated with own role
Interact with others	1.1, 2.5, 3.2, 3.3	• Complies with work instructions and contributes to work group discussions using accepted conventions
Get the work done	1.3, 1.4, 2.1- 2.4, 3.1	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions based on implementation of standard procedures • Uses 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**
BSBLIB301 Catalogue objects into collections	CULCNM301A Catalogue objects into collections	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB301 Catalogue objects into collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- complete registration worksheets
- enter information from registration worksheets into catalogues.

Note: If a specific volume or frequency 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 cataloguing tools
- explain organisational policies in relation to cataloguing and collection management
- explain how to locate and select copyright and intellectual property legislation that relates to:
  - intellectual property rights of owners
  - copyright in collection objects.

Assessment Conditions

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

- objects to be catalogued
- organisational policies and procedures for cataloguing and collection management
- cataloguing tools
- a working catalogue.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBLIB302 Develop and apply knowledge of archives

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to apply an understanding of the difference between archives and other collections and how this affects the arrangement and management of collections.

It applies to individuals in support roles who require some theoretical and practical understanding of the nature of archives and how they are managed.

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

Unit Sector

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Consolidate understanding of archival institutions and records	1.1 Review and analyse archival institutions and their programs 1.2 Differentiate between records, archives and other collection material on the basis of their respective management needs and legislative requirements 1.3 Research records to determine their provenance, purpose and contribution to heritage, culture and evidential value 1.4 Determine risks associated with loss of archival records
2 Develop an understanding of	2.1 Discuss with relevant personnel ways that different elements of archive collections are managed

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ELEMENT	PERFORMANCE CRITERIA
collection management	2.2 Evaluate how collection management needs and processes affect the role of archivists 2.3 Identify linkages between archival principles and processes and legislation and the role of archivists
3 Arrange and describe records	3.1 Research record systems and their metadata 3.2 Arrange and describe records according to archival principles 3.3 Contribute to documentation of archival collections

Foundation Skills

This section describes language, 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 and analyses textual information from a range of sources and identifies relevant, key information
Writing	3.2, 3.3	• Develops material to convey explicit information and results using appropriate language and industry terminology • Breaks down complex information into component parts • Records key information in an accurate and sequential manner for internal reference
Oral Communication	2.1	• Uses listening and questioning to enhance clarity, quality and reliability of information
Numeracy	3.1-3.3	• Recognises and applies numerical data to sort and group archival and collections according to requirements
Navigate the world of work	2.3	• Understands own responsibilities for following correct principles and processes
Interact with others	2.1, 3.3	• Works collaboratively with others to achieve outcomes
Get the work done	1.1-1.4, 2.2, 3.1-3.3	• Works logically and systematically to undertake clearly defined and familiar tasks

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		• Applies problem-solving techniques as part of risk management procedures • Identifies how aspects of collection management can be applied in a range of contexts • 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**
BSBLIB302 Develop and apply knowledge of archives	CULCNM302A Develop and apply knowledge of archives	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB302 Develop and apply knowledge of archives

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- differentiate between records, archives and other collections
- apply an understanding of archival principles, processes and programs to arrangement and description of collection records
- work collaboratively with others involved in archival management, including archivists.

Note: If a specific volume or frequency 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 differences between archives and other collections
- explain general principles and processes of archival management and records management
- research information on archive sector, including:
  - principles and processes of archival practice, records and archives
  - role of archivists and archival programs
- examine key provisions of relevant legislation from all levels of government, regulations, standards and documentation that affect aspects of records and archives
- assess metadata format, use and application
- examine systems, such as:
  - principles of provenance and original order
  - archival control systems
  - records continuum theory
  - implementing preservation 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 Library – Collection Management field of work and include access to:

- information on a variety of archives and archival programs
- archive records, record-keeping systems and organisational policies

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB303 Provide multimedia support

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to use a range of multimedia equipment and programs at a non-specialist level.

It applies to individuals who work under supervision and have some responsibility to complete work within established guidelines.

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

Unit Sector

Library – Multimedia Technology

Elements 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 multimedia equipment and programs	1.1 Select appropriate multimedia equipment and programs for a given purpose 1.2 Identify work health and safety (WHS) issues associated with multimedia and take appropriate action to prevent injury or accident 1.3 Set up and operate multimedia equipment and programs according to organisational procedures 1.4 Use general features and functions of multimedia equipment

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Assist customers and colleagues to use multimedia equipment and programs safely and according to organisational procedures
2 Maintain multimedia equipment and programs	2.1 Identify and correct minor operational faults according to organisational procedures 2.2 Implement routine preventive maintenance, including making arrangement for repairs 2.3 Identify situations where specialist assistance is required and take appropriate action
3 Report on use of multimedia equipment and programs	3.1 Gather information from colleagues and customers on problems with use of current multimedia equipment and programs 3.2 Source and assess information on available multimedia equipment and programs, products and services based on feedback and intended use 3.3 Make recommendations for purchase of new or replacement items 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	1.2-1.5, 3.2	• Sources and interprets textual information to identify most efficient and productive approach to the job
Writing	3.1, 3.3	• Uses clear and specialist language to accurately document requirements and outcomes
Oral Communication	1.5, 3.1-3.3	• Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information
Numeracy	3.3	• Recognises and interprets numerical information relating to costs and specifications
Navigate the world of work	1.2, 1.3, 1.5, 2.1, 2.3	• Follows organisational protocols, policies and procedures relevant to own role • Seeks clarification or assistance when required
Interact with others	1.5, 2.3, 3.1-3.3	• Cooperates with others and contributes to work practices where joint outcomes are expected and

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		deadlines are to be met
Get the work done	1.1, 1.4, 1.5, 2.1-2.3, 3.1-3.3	• Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaboration • Analyses task requirements to decide on appropriate equipment and practices • Initiates standard diagnostic procedures when responding to familiar and unfamiliar problems within immediate context and seeks input from others when problems remain unresolved • 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**
BSBLIB303 Provide multimedia support	CULDMT301A Provide multimedia support	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB303 Provide multimedia support

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- use current multimedia equipment and programs
- assist others to use multimedia equipment and programs
- correct minor operational faults
- report on use of multimedia equipment and programs and make recommendations for upgrading.

Note: If a specific volume or frequency 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 range of current multimedia options relevant to the work context at a generalist level
- describe features and general operating functions of different multimedia options
- list common faults and ways of rectifying these in multimedia equipment and programs used
- outline scope of repair and maintenance activities that can be undertaken without specialist assistance
- identify sources of information on multimedia equipment and programs
- explain conditions of current licences and equipment maintenance agreements.

Assessment Conditions

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

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- current range of multi-media equipment and programs and associated software applications
- audiovisual equipment.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB304 Develop and use information literacy skills

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to define, locate, select, evaluate and present information in response to identified needs.

It applies to individuals employed in any capacity, as well as members of the wider community, as information literacy skills have broad application in all industries, as well as to life skills in general.

At this level, work is usually undertaken under supervision, though some autonomy and judgement can be expected within established parameters.

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

Unit Sector

Library – Information 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 Source information to meet specific needs	1.1 Determine exact nature of information needs 1.2 Confirm purpose of outcomes required from information searches

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify range of potentially appropriate sources of information 1.4 Use basic search strategies to locate relevant information
2 Evaluate information against needs	2.1 Assess search results and located information and adjust search strategies as necessary 2.2 Review search results and select relevant information to meet requirements
3 Prepare and present information to meet needs	3.1 Prepare results of information searches according to organisational procedures 3.2 Present information concisely and accurately in a context or format appropriate to purpose 3.3 Meet agreed deadlines in relation to presentation of information
4 Develop own information literacy skills	4.1 Evaluate own information literacy skills based on feedback from customers and colleagues 4.2 Seek opportunities to develop own information literacy skills based on 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
Learning	4.1, 4.2	• Uses feedback from others to review own skills and seek development opportunities
Reading	1.1, 1.3, 1.4, 2.1, 2.2, 4.2	• Comprehends and interprets instructions and identifies, interprets and integrates relevant information from a variety of sources, including opinions of others
Writing	3.1, 3.2	• Summarises material using appropriate vocabulary, grammar and text that is suitable for the audience and purpose; conveying ideas clearly, concisely and coherently
Oral Communication	1.1, 1.2, 4.1, 4.2	• Comprehends verbal instructions, directions and requests through active listening and asking relevant questions to aid understanding; and conveys ideas and information clearly and succinctly

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Navigate the world of work	3.1-3.3	• Follows organisational procedures and meets expectations associated with own role
Interact with others	1.1, 1.2, 4.1, 4.2	• Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met
Get the work done	1.1-1.4, 2.1, 2.2, 3.1	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Analyses task requirements to decide on appropriate action • Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB304 Develop and use information literacy skills	CULINL301A Develop and use information literacy skills	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB304 Develop and use information literacy skills

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- define, locate, select and evaluate relevant information in response to identified needs
- present information in a logical, well-organised and appropriate manner
- assess and develop strategies to improve own information literacy skills
- complete tasks in industry realistic timelines 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:

- identify types of information resources available on a range of topics relevant to job role or required outcome
- discuss techniques and procedures for accessing different information sources, including use of current technology
- discuss relevant protocols or organisational policies and procedures in relation to presentation of different types of information.

Assessment Conditions

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

- range of print and electronic information resources
- special purpose tools, equipment, materials, systems and industry software packages.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB305 Use established cataloguing tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes skills and knowledge required to select and use established tools, systems, technologies, conventions and standards to search, retrieve and validate data from catalogues at an introductory level.

It applies to individuals working in a library or information services context, under supervision, who apply a general understanding of cataloguing and bibliographic concepts in their job.

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

Unit Sector

Library – 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 Select cataloguing tools	1.1 Access sources of cataloguing rules and tools relevant to organisation 1.2 Develop an understanding of basic components and structure of bibliographic records 1.3 Identify relevance of different cataloguing tools to particular areas of work 1.4 Select appropriate cataloguing tools to complete specific work

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ELEMENT	PERFORMANCE CRITERIA
	activities
2 Search and retrieve bibliographic records	2.1 Search online catalogues to determine availability of existing bibliographic records in local system 2.2 Search other library catalogues or external databases to locate suitable bibliographic records 2.3 Retrieve and download suitable bibliographic records to local system
3 Apply cataloguing standards	3.1 Check downloaded bibliographic records for accuracy according to cataloguing standards 3.2 Consult with relevant colleagues regarding accuracy of bibliographic 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, 2.1-2.3, 3.1, 3.2	• Interprets, consolidates and checks completeness and accuracy of information and data • Interprets information from sources to identify relevant and key information
Writing	1.4, 3.2	• Accurately records and completes information in organisational systems
Oral Communication	3.2	• Provides key information and asks questions to clarify understanding
Numeracy	1.1, 1.2, 1.4, 2.1, 2.2	• Interprets and uses mathematical information embedded in cataloguing systems
Navigate the world of work	1.1-1.3, 3.1	• Follows workplace procedures and meets expectations associated with own role • Maintains knowledge of cataloguing tools relevant to own role
Interact with others	3.2	• Complies with work instructions and contributes to work group discussions

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Get the work done	1.1, 1.4, 2.1-2.3	• Plans and implements routine tasks and workload • Analyses task requirements to decide on appropriate procedure to follow • Uses familiar digital technologies and systems to access information, search and enter data, and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB305 Use established cataloguing tools	CULINM301A Use established cataloguing tools	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB305 Use established cataloguing tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- apply general knowledge of cataloguing tools and standards to work activities
- demonstrate an understanding of cataloguing entries and components to search and retrieve records
- use current industry systems, technologies and conventions.

Note: If a specific volume or frequency 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 principal cataloguing tools used in libraries and information services in Australia endorsed by the Australian Committee on Cataloguing (ACOC)
- describe application of tools to different areas of work
- outline rationale behind cataloguing tools and systems in the broad library and information services context
- explain basic components and structure of bibliographic records, including descriptive cataloguing records and machine readable cataloguing (marc) formats
- describe commonly used classification and subject heading schemes.

Assessment Conditions

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

- special purpose tools, equipment, materials and industry software packages
- current cataloguing rules, technologies and systems

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- relevant policy and procedures documents.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB306 Process and maintain information resources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to locate, check, record, store and maintain audiovisual, digital and print-based information.

It applies to individuals working in a library and information services context who are responsible for processing and maintaining information resources, generally under supervision and within established procedures.

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

Unit Sector

Library – Information 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 Undertake information processing tasks	1.1 Label and protect information resources appropriately and apply security measures 1.2 Check outsourced shelf-ready items for processing according to organisational procedures 1.3 Make suggestions for processing and storage, taking into account the expected life, use of, and demand for resources 1.4 Record and process details of information resources according

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ELEMENT	PERFORMANCE CRITERIA
	to organisational procedures and processing systems 1.5 Promptly identify problems with processing systems and procedures and report to relevant personnel
2 Arrange resources to facilitate access	2.1 Check and organise information resources promptly for appropriate arrangement or classification 2.2 Shelve printed resources according to required classification order and organisational requirements 2.3 Arrange non-printed resources according to required classification systems 2.4 Follow safety procedures, including safe manual-handling techniques when handling resources
3 Monitor resources	3.1 Regularly check resources for correct arrangement and promptly report missing or damaged resources 3.2 Undertake basic maintenance and minor repairs of damaged resources and refer unresolved repairs to supervisor 3.3 Move and transfer resources using procedures 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, 1.4, 2.1-2.4, 3.1, 3.3	• Interprets, consolidates and checks completeness and accuracy of information and data
Writing	1.1, 1.4, 1.5,	• Accurately records and completes information in organisational systems
Oral Communication	1.3, 1.5, 3.2	• Interacts effectively in verbal exchanges, using active listening and questioning to convey and clarify information
Numeracy	1.4, 2.1-2.3, 3.1	• Identifies and comprehends mathematical information related to counting and checking information resources
Navigate the	1.1, 1.2, 1.4, 1.5,	• Recognises and follows explicit and implicit protocols, policies and procedures and meets expectations

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world of work	2.2-2.4, 3.3	associated with own role • Seeks clarification or assistance when required
Interact with others	1.3, 1.5, 3.2	• Complies with work instructions and contributes to work group discussions using accepted conventions
Get the work done	1.1, 1.3, 1.5, 2.1, 3.1, 3.2	• Determines job sequence and works logically and systematically to undertake clearly defined tasks in a timely manner • Makes low-impact decisions within familiar situations, based on a range of pre-defined or routine solutions • Responds to predictable routine problems and implements standard or logical solutions • Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures and security requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB306 Process and maintain information resources	CULINS301A Process and maintain information resources	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB306 Process and maintain information resources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- process and maintain a broad range of print, audiovisual and multimedia information resources according to established procedures
- apply a broad knowledge of classification systems and techniques for processing and maintaining information 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:

- describe standard methods of organising and arranging materials, equipment and information, including:
  - arrangements designed to facilitate access to materials and information
  - common classification systems and formats
- discuss basic information technology security procedures
- identify and interpret organisational policies and procedures regarding processing, repair, maintenance, and disposal or replacement of damaged items
- describe a range of protective and security devices for materials in different formats
- identify work health and safety requirements
- identify safe manual-handling techniques
- describe types of damage and deterioration for print and electronic information, and different protection and storage 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 Library – Information Services field of work and include access to:

- industry-current equipment and classification systems
- information resources to be processed and maintained
- relevant policy and procedures documents
- special purpose tools, equipment, material
- relevant industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB401 Record and maintain collection information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to source collection information, and focuses on the maintenance and integrity of collection material records.

It applies to individuals who work autonomously within established guidelines, with responsibility for planning, monitoring and completing work activities.

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

Unit Sector

Library – Collection 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 Record collection information	1.1 Confirm collection material to be recorded, and associated timelines 1.2 Handle material in a manner which ensures its integrity according to organisational access requirements 1.3 Research relevant information sources to establish information for fields of information 1.4 Enter data into collection records following organisational procedures and guidelines

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Follow legal constraints and cultural protocols regarding data protection and management 1.6 Process records, applying suitable formats
2 Maintain information records	2.1 Update or transfer information according to organisational policies and procedures 2.2 Protect confidential information and adhere to copyright requirements for record storage 2.3 Store records safely and according to organisational procedures
3 Improve information recordkeeping	3.1 Resolve record maintenance problems within scope of own job role or refer to relevant personnel as required 3.2 Seek feedback on own work performance and note areas for improvement 3.3 Identify opportunities to improve recordkeeping of collection information and recommend 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	1.3, 1.5, 1.6. 2.1-2.3, 3.1, 3.3	• Interprets key information and data from a range of sources to determine and complete work requirements
Writing	1.1, 1.4, 1.6, 2.1, 3.1-3.3	• Applies correct formats in line with organisational records processing policies and procedures • Prepares recommendations for continuous improvement of records processing and recording • Produces workplace documentation using appropriate vocabulary and formats, and correct grammatical structures and conventions
Oral Communication	1.1, 3.1-3.3	• Listens and responds to instructions and feedback to ensure correct recording and maintenance of collection information • Uses appropriate tone and language when communicating with others

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Numeracy	1,1, 1.3-1.6, 2.1, 3.3	• Interprets numerical information and applies basic mathematical calculations relating to measurement, tracking and retrieval of collections data • Works with and complies with sequential numerical record-keeping systems requirements
Navigate the world of work	1.1, 1.2, 1.4, 1.5, 2.1-2.3, 3.1	• Takes personal responsibility for meeting deadlines and following explicit and implicit policies, procedures and legislative or regulatory requirements
Interact with others	1.1, 3.1-3.3	• Collaborates and cooperates with others to achieve outcomes
Get the work done	1.1-1.3, 3.1, 3.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Accepts responsibility for addressing predictable problems and initiates standard procedures in response, applying problem solving processes in determining a solution • Uses digital technologies and systems to access information, search and enter data, present information and communicate with others, cognisant of data security and safety • Uses analytical and lateral thinking to review practices and suggest improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB401 Record and maintain collection information	CULCNM403A Record and maintain collection information	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business Services Training Package.	Equivalent unit

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Assessment Requirements for BSBLIB401 Record and maintain collection information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- access relevant information sources
- enter information into records accurately
- interpret and distil information for record-keeping purposes
- apply collection record-keeping formats and protocols.

Note: If a specific volume or frequency 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 copyright, moral rights, intellectual property and privacy issues and legislation relevant to keeping records of collections
- list key requirements of current industry record-keeping systems
- analyse and describe ethical and cultural issues that impact collection record-keeping, including those for Aboriginal or Torres Strait Islander material
- describe handling procedures and identification techniques for collection material
- locate and interpret information sources relevant to collections
- interpret organisational procedures and guidelines for collection record-keeping
- describe principles of access and accountability in collection record-keeping
- identify and explain sources of curatorial and conservation advice.

Assessment Conditions

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

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- use of current industry record-keeping systems
- access to organisational procedures and guidelines, collection items and other relevant information sources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB402 Consolidate and maintain industry knowledge

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to develop and apply knowledge of library and information services and/or the cultural industry sectors of museums and galleries, and maintain its currency.

It applies to individuals who are working in or seeking work in organisations providing library and information services and/or galleries and museums, and who work autonomously according to established procedures.

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

Unit Sector

Library – 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 Undertake industry research	1.1 Use sources of information to research industry developments and their impact on current work practices 1.2 Collect information on the role and significance of information or cultural industries to local communities 1.3 Identify similarities and differences between industry organisations 1.4 Consolidate understanding of the roles of relevant peak

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ELEMENT	PERFORMANCE CRITERIA
	professional associations and industry bodies
2 Source and apply information about trends	2.1 Source and monitor information about key issues and trends and investigate their impact on the industry 2.2 Research current and emerging technologies and their potential application in the workplace 2.3 Source and monitor information about career opportunities and employment conditions 2.4 Organise and store collected information in an easily accessible format 2.5 Discuss and share information about key issues and trends, and emerging technologies with colleagues
3 Research industry structures and operations	3.1 Source information about different industry structures and operations 3.2 Analyse underpinning philosophies and funding models of different industry sectors and link to service provision 3.3 Identify and source information about legislation that affects relevant industry sectors 3.4 Review information on professional ethics and codes of practice for relevant industry sectors

Foundation Skills

This section describes language, 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	• Identifies, analyses and evaluates complex text to determine legislative, regulatory and business requirements • Researches and interprets information from various sources and synthesises ideas and concepts
Writing	1.2, 1.4, 2.5	• Develops material to a specific audience using clear and detailed language to convey explicit information, requirements and recommendations
Oral	1.2, 2.5	• Elicits views and opinions of others by listening and questioning

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Communication		
Navigate the world of work	1.1, 1.4, 3.2, 3.3, 3.4	• Explores industry trends impacting organisational policies and procedures
Interact with others	1.2, 2.5	• Cooperates with others and contributes to work group discussions
Get the work done	1.2, 1.3, 2.1, 2.2, 2.4, 3.2	• Organises, plans and sequences own workload • Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking • Uses a range of digitally based 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**
BSBLIB402 Consolidate and maintain industry knowledge	CULIND401A Consolidate and maintain industry knowledge	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB402 Consolidate and maintain industry knowledge

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- source, assess and evaluate a range of information for the relevant industry sector
- explain value and principles of relevant industry sector, and how they relate to funding and service delivery
- recognise legislation relevant to the workplace and ethical issues
- identify major industry trends and technology developments
- identify a career path.

Note: If a specific volume or frequency 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 information on library and information services and/or cultural industry sectors of museums and galleries
- outline historical development of relevant industry sectors
- explain underpinning values, principles and philosophies of the relevant industry sectors
- identify legislation and ethical practices impacting the relevant industry sectors
- outline career opportunities and career pathways in the relevant industry sectors
- discuss current trends within the relevant industry sectors and the potential impacts and opportunities they present
- explain the nature, role and functions of relevant major professional associations or industry bodies
- discuss employee and employer obligations.

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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 Library – Industry Capability field of work and include access to:

- current sources of industry information
- appropriate technology to undertake research and prepare documents.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB403 Complete a range of cataloguing activities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to design systems and structures related to copy and original descriptive cataloguing; to search, retrieve and edit material from existing records and to undertake general catalogue maintenance. This requires application of a sound knowledge of cataloguing standards and systems.

It applies to individuals in information services organisations, working according to established procedures and guidelines, with minimal supervision, and with responsibility for maintaining catalogues, as well as for copy and original descriptive cataloguing.

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

Unit Sector

Library – 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 Construct bibliographic descriptions	1.1 Apply relevant national and international standards and accepted variations when cataloguing material 1.2 Create original catalogue records for a variety of formats and check authority files following relevant standards 1.3 Ensure created records include sufficient and relevant access points for ease of retrieval by catalogue users

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Construct descriptions to suit customer needs according to automated system and organisational procedures 1.5 Create item of records and statement of holdings
2 Locate, retrieve and transfer bibliographic information and records	2.1 Search own cataloguing database to determine availability of existing bibliographic records for same or similar items 2.2 Search external catalogues or databases to create copy catalogue records from suitable bibliographic records 2.3 Download and upload bibliographic records to local system in line with organisational techniques and procedures
3 Edit bibliographic records	3.1 Check downloaded bibliographic records for accuracy and compliance with local cataloguing procedures 3.2 Edit downloaded records as necessary according to system and organisational procedures 3.3 Add item to records and holdings statements
4 Provide cataloguing support	4.1 Undertake appropriate catalogue maintenance to preserve integrity of local database 4.2 Apply national systems and standards to facilitate database searching and future cataloguing 4.3 Use data from shelf lists and relevant statistics captured by automated systems to inform cataloguing decisions 4.4 Advise relevant personnel on the need for new authority records as necessary and according to organisational guidelines 4.5 Consult with relevant personnel regarding cataloguing issues or problems and take appropriate 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, 2.1-2.3, 3.1, 3.2, 4.1-4.3	• Interprets procedures and documents to inform actions and critically analyses texts to enable completion of tasks

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Writing	1.2, 1.4, 1.5, 3.2, 3.3, 4.4, 4.5	• Translates technical information from source material into a meaningful form and communicates relationships between ideas and information in a style appropriate to audience and purpose
Oral Communication	4.4, 4.5	• Conveys information related to work tasks clearly and succinctly and derives relevant information through engagement with colleagues in work-related discussions
Numeracy	1.2, 1.3, 2.1-2.3, 3.1, 3.2, 4.1-4.3, 4.5	• Extracts and applies mathematical information embedded in a range of tasks and texts
Navigate the world of work	1.1, 1.2, 1.4, 2.3, 3.1, 3.2, 4.2, 4.4	• Takes personal responsibility for following explicit and implicit policies, procedures and cataloguing standards • Accepts responsibility and ownership for tasks and makes decisions on completion parameters and the need for coordination with others
Interact with others	4.4, 4.5	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1-1.5, 2.1-2.3, 4.1-4.5	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions based on implementation of standard procedures • Applies analytical processes to resolve technical or conceptual problems • Uses a range of digitally based 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**
BSBLIB403 Complete a range of cataloguing activities	CULINM401A Complete a range of cataloguing activities	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		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 BSBLIB403 Complete a range of cataloguing activities

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- create, edit and maintain catalogue records accurately, and in the process demonstrate:
  - sound knowledge of bibliographic and catalogue record components
  - knowledge of cataloguing standards
  - use of current industry systems
- complete activities within realistic workplace 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:

- reference cataloguing standards and systems used in Australian libraries endorsed by the Australian Committee on Cataloguing (ACOC)
- apply commonly used automated cataloguing systems and shared cataloguing networks
- analyse frequently occurring cataloguing problems
- describe principles of bibliographic description and access
- compare and contrast ways of preparing original and copy cataloguing records
- describe procedures for maintaining cataloguing records
- discuss copyright, moral rights and intellectual property issues and legislation that impact cataloguing.

Assessment Conditions

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

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- access to relevant policy and procedures documents
- use of current industry cataloguing tools, systems and standards.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB404 Use integrated library management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to apply a basic understanding of the interrelated functions of integrated library management systems (ILMS) to use online catalogues, process loan transactions, and provide circulation and lending services to meet customer needs.

It applies to individuals in frontline information services roles in libraries working under limited supervision, within established policies and procedures.

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

Unit Sector

Library – 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 Create records in the ILMS	1.1 Develop an understanding of basic functions of an ILMS, including interrelation of different modules 1.2 Register new borrowers on the automated circulation system according to organisational and system guidelines 1.3 Process an acquisition by creating a record in the acquisition module 1.4 Generate an interlibrary loan request by creating a request

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ELEMENT	PERFORMANCE CRITERIA
	through the ILMS
2 Provide customer support in relation to circulation and lending	2.1 Provide current and accurate information to customers in relation to circulation and lending policies and procedures, including self-service systems 2.2 Process loan and return transactions according to organisational policies and procedures, including security procedures 2.3 Follow safe work practices when performing circulation and lending services 2.4 Manage competing demands for services according to customer service standards 2.5 Resolve customer enquiries and complaints within scope of own job role 2.6 Refer complex customer queries and complaints to relevant personnel 2.7 Provide information on range of services which may incur costs, including pre-paid services 2.8 Process financial transactions
3 Use online catalogues to assist customers	3.1 Use basic search features of online catalogues to provide current and accurate information to customers 3.2 Use online catalogues to assist customers in locating information resources in library collections 3.3 Explain classification numbers and shelving location symbols or prefixes displayed on online catalogues to customers
4 Maintain knowledge of ILMS trends and emerging technologies	4.1 Source information about current industry trends and emerging technologies in relation to ILMS 4.2 Provide information to colleagues in relation to add-on library automation software and hardware

Foundation Skills

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, 2.5, 3.1-3.3, 4.1	• Interprets information from structured texts, instructions and correspondence from colleagues or customers, and derives relevant information from more complex texts
Writing	1.2-1.4, 2.2, 2.6, 2.7, 3.1, 4.2	• Conveys technical and procedural information accurately and succinctly and communicates information in a style appropriate to purpose and audience
Oral Communication	1.2, 2.1, 2.2, 2.5-2.7, 3.2, 3.3, 4.2	• Establishes and maintains empathetic spoken communication with customers and colleagues, checks for understanding and clearly conveys information in a manner appropriate in the context
Numeracy	2.7, 2.8	• Selects, interprets and applies mathematical information embedded in simple financial transactions and information systems
Navigate the world of work	1.1, 1.2, 2.1-2.5, 4.1	• Ensures knowledge of integrated library management systems relevant to own role is accurate, comprehensive and current • Takes personal responsibility for following explicit and implicit policies and procedures • Accepts responsibility and ownership for tasks and makes decisions on completion parameters and the need for coordination with others
Interact with others	1.2, 2.1, 2.2, 2.5-2.7, 3.2, 3.3, 4.2	• Selects and uses appropriate conventions and protocols when communicating with customers and co-workers in a range of work contexts • Uses a range of strategies to establish a sense of connection and build rapport with customers and colleagues
Get the work done	1.2-1.4, 2.2, 2.4-2.6, 3.1, 3.2, 4.1, 4.2	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions based on implementation of standard procedures • Recognises and responds to predictable routine problems related to role in immediate work context • Applies analytical processes to resolve technical or conceptual problems • Uses familiar digital technologies and systems to access information, search and enter data, present information and communicate with others, cognisant of data security and safety

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLIB404 Use integrated library management systems	CULINM402A Use integrated library management systems	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB404 Use integrated library management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- use integrated library management systems (ILMS) to:
  - process loans and returns within required time constraints according to procedures
  - conduct basic online catalogue searches
  - assist customers find information using ILMS functions
  - create records in acquisitions module
  - generate interlibrary loans
- maintain knowledge of trends and emerging technologies affecting ILMS
- demonstrate provision of customer support, including resolution of customer enquiries and 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:

- describe basic functions of ILMS
- provide examples demonstrating the interrelation of different modules in the ILMS
- describe and illustrate interrelation between different functions of an automated library management system, including cataloguing, circulation, and acquisitions modules
- describe basic features of online catalogues
- describe basic features of automated circulation systems, including self-charging systems and associated technologies
- discuss application of organisational policies and procedures in relation to:
  - lending
  - interlibrary loans

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  - security
  - financial transactions
  - customer service
  - processing loans and returns
  - circulation services
- identify safe work practices relating to using an ILMS.

Assessment Conditions

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

- relevant policy and procedure manuals and loan processing systems
- an ILMS for loan processing and catalogue use, acquisitions and interlibrary loans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB405 Assist customers to access information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to help customers obtain information they need, that can be found in readily accessible sources.

It applies to individuals working in frontline information services roles in any industry sector. They may be working in library and information services organisations, records management units, government departments, tourist information centres or community advisory organisations. These roles are undertaken within established guidelines under general supervision.

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

Unit Sector

Library – Information 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 Clarify customer information requirements	1.1 Use communication techniques appropriate to the form of customer contact to identify exact nature of information request 1.2 Confirm purpose of information request and any special requirements 1.3 Compile basic search terms, including list of keywords and phrases appropriate to topics

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ELEMENT	PERFORMANCE CRITERIA
2 Follow search strategies	2.1 Construct and follow appropriate search strategies to locate information using industry-current information sources and equipment 2.2 Assist customers to develop own information-seeking skills and become independent learners 2.3 Demonstrate use of industry-current information sources and equipment using language, and at a level and pace, appropriate to customers 2.4 Advise customers on other access arrangements, including interlibrary loans and document delivery and supply services 2.5 Inform customers of constraints regarding access to information or use of reference tools and equipment
3 Source and provide information	3.1 Source information from readily accessed sources in response to customer requests 3.2 Provide information in appropriate format, and confirm with customers that their information need has been met 3.3 Take appropriate action to resolve remaining issues or refer customers to other 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	1.3, 2.1-2.4, 3.1, 3.2	• Interprets information from sources to identify relevant and key information
Writing	1.1, 1.3, 2.1, 2.4, 2.5, 3.1, 3.2	• Documents information, selecting appropriate vocabulary and structure for audience, for informal and formal purposes
Oral Communication	1.1, 1.2, 2.2-2.5, 3.2, 3.3	• 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	2.1, 2.4, 2.5, 3.2, 3.3	• Takes personal responsibility for following explicit and implicit policies and procedures

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world of work		• Seeks clarification or assistance when required
Interact with others	1.1, 1.2, 2.2-2.5, 3.2, 3.3	• Selects and uses appropriate conventions and protocols when communicating with customers and co-workers in a range of work contexts • Uses a range of strategies to establish a sense of connection and build rapport with customers
Get the work done	1.2, 1.3, 2.1, 2.3, 3.1, 3.3	• Organises, plans and sequences own workload • Makes routine decisions based on implementation of standard procedures • Responds to predictable routine problems and implements standard or logical solutions • Uses familiar digital technologies and systems to access information, search and enter data, present information and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB405 Assist customers to access information	CULINS401A Assist customers to access information	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB405 Assist customers to access information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- use bibliographic tools and industry-current technology
- communicate information to several customers using a range of print and electronic information sources
- apply well-developed information literacy skills
- respond constructively to a wide range of information requests within established collections.

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

Knowledge Evidence

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

- reference organisational policies in relation to customer assistance
- describe typical customer requests and appropriate information sources for responding
- describe techniques for using print and electronic reference resources and tools, including formulating search strategies
- analyse a range of information resources, formats and delivery options, including:
  - document delivery and supply processes
  - electronic and print
  - interlibrary loans
- outline copyright, moral rights and intellectual property legislation, and issues relevant to information services providers
- explain cultural considerations when working with customers and potentially sensitive material.

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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 Library – Information Services field of work and include access to:

- a range of library and information services and resources
- industry-current information technologies
- relevant policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB406 Obtain information from external and networked sources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to establish the information needs of customers, and then search external and networked sources to meet those needs.

It applies to individuals working in frontline information services roles within established guidelines and under general supervision in library and information services contexts. They may be working in public, school, medical, law, business, or academic libraries. Work relates to information requests that cannot be satisfied from sources within the organisation.

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

Unit Sector

Library – Information 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 Determine customer information needs	1.1 Determine and confirm exact nature of information needs with customer 1.2 Discuss options for satisfying requests with customer, taking into account any specific requirements 1.3 Where appropriate, keep customer informed of delivery progress

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Recommend alternative options to fulfil customer information needs as required
2 Clarify details of required information resources	2.1 Verify bibliographic and other relevant details sufficient to locate required information resources 2.2 Check availability of required information from external or networked sources
3 Search external and networked sources	3.1 Complete information search based on knowledge of appropriate external and networked sources 3.2 Check availability of information resources from external and networked sources by searching their library catalogues for items already held, and electronic databases 3.3 Verify knowledge of reciprocal interlibrary lending networks and document delivery systems and services to source required information 3.4 Seek assistance from colleagues to locate unusual or difficult to locate information
4 Obtain and return information	4.1 Complete and despatch requests to external sources using organisational standards, systems and procedures 4.2 Monitor requests to external sources and follow-up as required 4.3 Check condition of information resources received from external sources and confirm they meet customer needs 4.4 Monitor receipt of electronic documents and present to customers using approved delivery methods 4.5 Ensure compliance with copyright legislation in relation to supply of photocopied or electronic documents 4.6 Take action to recall material, where required, and return to provider in the required condition 4.7 Inform provider of difficulties in relation to return of material and take action

Foundation Skills

This section describes 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, 2.2, 3.1-3.4, 4.1-4.5	• Evaluates information resources from a variety of sources to ensure appropriateness to client needs • Interprets information from sources to identify relevant and key information
Writing	1.1-1.4, 3.1, 3.4, 4.1, 4.2, 4.6, 4.7	• Accurately records and completes organisational documents and correspondence using clear language and correct spelling, grammar and terminology
Oral Communication	1.1-1.4, 2.2, 3.4, 4.2, 4.6, 4.7	• Uses appropriate techniques, including active listening and questioning, to clarify information and confirm understanding
Navigate the world of work	3.1, 3.4, 4.1, 4.4, 4.5	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements • Seeks clarification or assistance when required
Interact with others	1.1-1.4, 2.2, 3.4, 4.2, 4.6, 4.7	• Selects and uses appropriate conventions and protocols when communicating with customers and co-workers in a range of work contexts
Get the work done	1.1, 1.2, 1.4, 2.1, 2.2, 3.1, 3.3, 3.4, 4.2-4.4, 4.6, 4.7	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions based on implementation of standard procedures • Responds to predictable routine problems and implements standard or logical solutions • Uses familiar digital technologies and systems to access information, search and enter data, present information and communicate with others

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB406 Obtain information from external and networked sources	CULINS402A Obtain information from external and networked sources	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		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 BSBLIB406 Obtain information from external and networked sources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- communicate effectively and efficiently with customers
- apply well-developed information literacy skills
- use external sources and bibliographic tools, including electronic sources, to obtain different types of information
- search external sources effectively to meet a range of different information needs.

Note: If a specific volume or frequency 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 bibliographic records
- identify and discuss copyright, moral rights and intellectual property legislation and issues of interlibrary loans and document supply
- evaluate document delivery services and options, including for electronic formats
- identify external sources of information
- analyse information services networks that facilitate access to external sources
- locate and reference interlibrary lending policies and standards, such as the Australian Interlibrary Resource Sharing (ILRS) code
- evaluate range of available information sources for print and electronic materials
- evaluate range of available interlibrary lending networks and document delivery services and organisations
- discuss and compare search strategies for external and networked sources.

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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 Library – Information Services field of work and include access to:

- a range of library and information services and resources
- industry-current information technologies
- relevant policies, procedures and documents on access to external sources of information
- special purpose equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB407 Search library and information databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to search and analyse information from a range of bibliographic and full text databases, evaluate these against specific criteria, and then present this information to clients.

It applies to individuals who undertake regular database searches as part of their information services role. Work is undertaken with limited supervision and according to organisational and system guidelines.

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

Unit Sector

Library – Information 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 Identify and access databases	1.1 Assess range of databases available to information services providers 1.2 Differentiate between databases and internet websites as sources of information 1.3 Select appropriate databases to meet specific information needs 1.4 Use required procedures to access databases

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Comply with copyright and licensing conditions relevant to use of databases
2 Construct searches	2.1 Conduct database searches using a range of search techniques suited to information needs 2.2 Use and manipulate features of databases to construct effective searches and access required information 2.3 Consult online manuals and database search tips to refine or revise search strategies
3 Present information	3.1 Evaluate search results to identify information that meets needs 3.2 Conduct further searches and evaluations and download as required 3.3 Present or organise information in formats appropriate to customer needs 3.4 Prepare reference lists as required according to standard referencing styles

Foundation Skills

This section describes language, 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,	• Critically analyses information from a variety of physical and electronic sources and consolidates information to determine requirements
Writing	1.3, 3.3, 3.4	• Accurately records and completes organisational documents using clear language and correct spelling, grammar and terminology
Oral Communication	3.3	• Uses appropriate techniques, including active listening and questioning, to clarify information and confirm understanding
Numeracy	1.1-1.3, 2.1-2.3, 3.1-3.3	• Extracts and evaluates mathematical information embedded in a range of tasks and texts
Navigate the world of work	1.1, 1.2, 1.4, 1.5, 3.3, 3.4	• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements

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		• Maintains knowledge of databases and sources of information necessary to perform role
Interact with others		• Selects and uses appropriate conventions and protocols when communicating with customers and co-workers in a range of work contexts
Get the work done	1.3, 1.4, 2.1- 2.3, 3.1-3.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions based on implementation of standard procedures • Responds to predictable routine problems and implements standard or logical solutions • Uses familiar digital technologies and systems to access information, search and enter data and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB407 Search library and information databases	CULINS403A Search library and information databases	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB407 Search library and information databases

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse and evaluate a range of databases
- adopt appropriate search techniques to source information in response to a range of customer needs
- use current industry systems and equipment efficiently and effectively
- respond effectively and appropriately to multiple and varied information 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 role of databases in context of the information services industry
- describe scope and type of databases available to information services providers
- define features of commonly used databases, including:
  - bibliographic information
  - downloadable records
  - in-print status
  - current prices
- describe differences between database and internet searching
- compare and contrast several database searching techniques and procedures
- identify relevant copyright, moral rights and intellectual property issues and legislation relevant to the use of information from 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 Library – Information Services field of work and include access to:

- technology and databases to support information searching
- special purpose tools, equipment, materials and relevant industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB501 Manage lending and borrowing processes for collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to establish and implement procedures for lending and borrowing collection material.

It applies to individuals who possess specialised knowledge, have a degree of autonomy and are responsible for protecting the integrity of collection material.

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

Unit Sector

Library – Collection 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 procedures for lending and borrowing collection material	1.1 Confirm conditions and criteria for lending and borrowing collection material 1.2 Determine limits of responsibility in relation to lending and borrowing collection material 1.3 Verify lending and borrowing procedures with relevant stakeholders
2 Negotiate lending and	2.1 Conduct negotiations with lenders and borrowers according to

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ELEMENT	PERFORMANCE CRITERIA
borrowing of collection material	procedures and in a manner that maintains goodwill between individuals and relevant organisations 2.2 Confirm loan or borrowing conditions and costs, and assess whether these can be met 2.3 Assess risks for the organisation associated with lending or borrowing transactions and take steps to address them 2.4 Complete and review written agreements ensuring consistency in negotiations and procedures 2.5 Arrange for execution of written agreements by relevant parties 2.6 Complete organisational records consistent with procedures
3 Manage operations	3.1 Instigate operational arrangements for lending and borrowing to proceed 3.2 Monitor operations to ensure lending and borrowing of collection material proceeds according to plan 3.3 Review lending and borrowing procedures on a regular basis and take steps to improve own performance 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, 2.1, 2.2, 2.4, 3.1-3.3	• Interprets workplace documentation and applies rules to borrowing transactions • Checks prepared documentation for compliance with agreed terms and organisational procedures
Writing	1.1, 1.3, 2.2, 2.4-2.6, 3.1, 3.3	• Develops written agreements consistent with agreed outcomes and procedures • Accurately maintains workplace records in line with organisational requirements
Oral Communication	1.1, 1.3, 2.1, 2.5, 3.1, 3.2	• Participates in verbal exchanges of ideas and elicits views and opinions of others by listening and questioning • Uses clear language to contribute information and express requirements

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Numeracy	1.1, 1.3, 2.2, 2.3, 2.6	• Determines and monitors borrowing and lending costs and transactions in line with organisational procedures
Navigate the world of work	1.1-1.3, 2.1, 2.2, 2.4-2.6, 3.1, 3.3	• Works independently and collectively in making decisions to achieve organisation outcomes • Seeks to improve policies and procedures to better meet organisational goals • Takes responsibility for managing organisational procedures and systems relevant to own role
Interact with others	1.1, 1.3, 2.1, 2.5, 3.1, 3.2	• Adapts personal communication style to build a positive working relationship and show respect for opinions, values and particular needs of others
Get the work done	1.1-1.3, 2.1-2.5, 3.1-3.3	• Takes responsibility for planning and organising own workload, and considers how to link with the work of others • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make decisions • Accepts responsibility for risk management, applying problem-solving processes to determine solutions • 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**
BSBLIB501 Manage lending and borrowing processes for collections	CULCNM502A Manage lending and borrowing processes for collections	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business Services Training Package.	Equivalent unit

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Links

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Assessment Requirements for BSBLIB501 Manage lending and borrowing processes for collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- review procedures for lending and borrowing collection material
- implement lending and borrowing procedures for collection material
- work cooperatively with others involved in lending and borrowing collection 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:

- identify and explain common procedures and practices for lending and borrowing collection material, both for specific items and whole collections
- describe legal, ethical and financial requirements for lending and borrowing collection material
- locate and interpret cultural protocols for lending and borrowing collection material, including those associated with Aboriginal or Torres Strait Islander cultural material
- identify and explain purpose of subject matter expertise relevant to the work context
- identify potential sources for lending and borrowing collection material in a given work context
- list commonly required resources for lending and borrowing collection material
- explain security and protection issues impacting lending or borrowing
- describe intellectual property rights of stakeholders, including donors and recipients.

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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 Library – Collection Management field of work and include access to:

- relevant policies and procedures manuals
- a collection – for which procedures for lending and borrowing collection materials may be reviewed
- relevant personnel to reflect necessary communication and negotiation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB502 Manage the development of collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to determine collection needs to accession and de-accession collection material for galleries and collection bodies.

It applies to individuals who possess specialised knowledge, have a degree of autonomy and are responsible for managing all aspects of collections development.

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

Unit Sector

Library – Collection 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 collection needs	1.1 Review collection material against organisational objectives and collection requirements 1.2 Determine priorities in consultation with key stakeholders
2 Assess collection material to be accessioned	2.1 Use options to identify material that could be accessioned to meet collection needs 2.2 Assess key internal and external factors that impact options 2.3 Obtain expert advice on material and its relevance to collections

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ELEMENT	PERFORMANCE CRITERIA
	2.4 Assess potential material for significance and relevance to collections according to organisational collection management policies 2.5 Examine records to establish provenance and confirm significance 2.6 Identify resources required for accessioning collection material 2.7 Develop recommendations for accessioning collection material according to collection needs
3 Coordinate accessioning of collection material	3.1 Seek approval for accessioning collection material 3.2 Establish clear conditions for accessioning collection material according to organisational procedures and guidelines 3.3 Organise appropriate resources to accession collection material according to approval and conditions 3.4 Comply with legal, ethical and financial requirements and cultural protocols in the accession process 3.5 Negotiate terms and organise transfer of rights according to organisational procedures 3.6 Document agreements and terms according to organisational procedures and guidelines
4 Coordinate de-accessioning of collection material	4.1 Identify material to be de-accessioned from collections 4.2 Consult with experts on the material to determine impact of de-accessioning on the collection 4.3 Select options to de-accession material 4.4 Develop and implement recommendations for de-accessioning collection material according to organisational policies and 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
Reading	1.1, 2.1, 2.2, 2.4-2.6,	• Analyses and compares collection material and documents to determine requirements

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	3.2, 3.4, 3.6, 4.1	• Checks prepared documentation for compliance with terms, conditions and procedures for collection management
Writing	1.2, 2.3, 3.1-3.3, 3.5, 4.2	• Prepares specific information conveying an understanding of outcomes and alternatives, and uses terminology appropriate to present to relevant personnel • Ensures produced material reflects cultural protocols and legal, ethical and financial requirements • Uses specific and appropriate language to develop accessioning and de-accessioning agreements and recommendations
Oral Communication	1.2, 2.3, 2.7. 3.1, 3.5. 3.6, 4.2	• Initiates and participates in verbal exchanges of ideas and elicits views and opinions of others by listening and questioning • Uses a range of persuasive responses appropriate to audience and environment, and makes comparisons which show an understanding of requirements
Numeracy	3.4	• Interprets numerical information for compliance with financial requirements
Navigate the world of work	1.1, 2.4, 3.2-3.6, 4.4	• Takes full responsibility for following policies, procedures and legislative requirements • Takes responsibility for managing organisational policies, procedures, and protocols relevant to own role
Interact with others	1.2, 2.3, 2.7. 3.1, 3.5. 3.6, 4.2	• Uses collaborative techniques to engage stakeholders and colleagues in consultations and negotiations
Get the work done	1.1, 1.2, 2.1-2.7, 3.1-3.3, 4.1-4.4	• Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness • Systematically gathers and analyses all relevant information and evaluates options to make decisions about accessioning and de-accessioning collection material • Uses problem-solving techniques to identify and analyse issues • Uses 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
BSBLIB502 Manage the development of collections	CULCNM503A Manage the development of collections	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB502 Manage the development of collections

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- make and justify decisions regarding accessioning and de-accessioning collection material to meet collection needs
- apply organisational procedures and guidelines to manage development of collections
- negotiate and document processes and agreements in relation to collection 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:

- identify and interpret organisational procedures and guidelines regarding managing specific items and whole collections
- identify and explain the purpose of subject matter expertise, including curatorial and conservation
- locate and interpret sources for accessioning and de-accessioning options
- interpret and explain information regarding comparable collections and their importance
- describe legal, ethical and financial requirements for accessioning and de-accessioning
- locate and interpret cultural protocols for collections development and management that impact accessioning and de-accessioning of cultural material, including those for Aboriginal or Torres Strait Islander material
- explain security issues associated with collection material.

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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 Library – Collection Management field of work and include access to:

- an established or proposed collection as basis of decision-making
- organisational objectives, procedures and guidelines
- relevant personnel to reflect necessary communication and negotiation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB503 Develop and promote activities, events and public programs

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to plan, develop and promote activities, events and public programs for different customer groups.

It applies to individuals who work in a broad range of industry contexts and who focus on short-term planning and promotion of an activity, event or public program, and may have responsibility for the work outcomes of others.

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

Unit Sector

Library – Exhibitions and Visitor Programs

Elements 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 scope of public programs	1.1 Identify activities, events or public programs that meet current or future organisational priorities and policies 1.2 Evaluate external influences that may impact development of programs 1.3 Research customer needs, current development initiatives and wider community needs

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Establish educational, interpretive and commercial objectives in consultation with appropriate stakeholders
2 Develop concepts for public programs	2.1 Develop and document concepts for storylines, interpretive messages and themes 2.2 Integrate cultural and environmental protocols into concept development 2.3 Identify and use specialists as required 2.4 Prepare and present proposals for approval consistent with organisational procedures
3 Prepare to stage activities, events and public programs	3.1 Obtain resources required to complete activity, event or public program 3.2 Agree on preparation timeframes with relevant parties, and take steps to coordinate with other activities 3.3 Confirm facilities are capable of delivering activities to the specified range of users, and provide a suitable and safe environment 3.4 Ensure suitable resources are available to operate the required facilities 3.5 Undertake risk audits and take appropriate action according to organisational procedures
4 Organise publicity	4.1 Assess suitability of existing promotional materials for activities, events and public programs and audience 4.2 Contribute to development of strategies that target audiences within resource and time constraints 4.3 Ensure material contains valid and reliable information and appropriate interpretations
5 Evaluate programs	5.1 Obtain and provide formal and informal feedback from, and to, customers and colleagues 5.2 Modify activities according to feedback received and use feedback to inform future development 5.3 Establish and implement ongoing review mechanisms to ensure continuous improvement of programs

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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, 4.1, 4.3, 5.2	• Recognises and interprets different texts that meet requirements of the organisation
Writing	1.4, 2.1, 2.3, 2.4, 3.3, 4.2, 4.3, 5.1	• Prepares specific information which conveys an understanding of outcomes and alternatives, and uses terminology appropriate to present to relevant personnel
Oral Communication	1.4, 2.4, 3.2, 3.3, 4.2, 5.1	• Participates in a verbal exchange of ideas/solutions and uses detailed and clear language to clarify and present information according to requirements and audience
Numeracy	3.1, 3.4, 4.2	• Uses basic mathematical calculations to allocate and track resources to meet requirements within a set timeframe
Navigate the world of work	1.1, 2.2, 2.4, 3.2, 3.3, 3.5, 4.2	• Works independently and collectively in making decisions to achieve organisation outcomes • Takes full responsibility for following policies and procedures
Interact with others	1.4, 2.4, 3.2, 3.3, 4.2, 5.1	• Collaborates and cooperates with others to achieve joint outcomes • Uses appropriate conventions and protocols when communicating with colleagues and external stakeholders
Get the work done	1.1-1.4, 2.1, 2.4, 3.1-3.5, 4.1-4.3, 5.1-5.3	• Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses formal and informal processes to evaluate solutions as part of continuous improvement • Uses problem-solving techniques to identify and analyse issues • Contributes to development and implementation of promotional strategies • Accepts responsibility for risk management, applying problem-solving processes to determine solutions • Uses 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**
BSBLIB503 Develop and promote activities, events and public programs	CULEVP503A Develop and promote activities, events and public programs	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB503 Develop and promote activities, events and public programs

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- research, plan, develop and promote activities, events or public programs to meet specified needs
- conduct and evaluate effectiveness of activities, events or public 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 subject matter around which activities, events or public programs are developed
- outline features of typical policies, procedures and practices relating to provision of activities, events and public programs
- explain the concept of sustainable practice and its relevance to development of public programs
- identify sources of advice and specialist assistance for activity development
- discuss techniques for planning and scheduling activities, events and public programs
- outline interpretation techniques suitable for a wide range of audiences
- identify resources for planning, promoting, delivering and evaluating activities, events and public programs
- explain cultural protocols to be observed in developing programs, including those relating to Aboriginal or Torres Strait Islander contexts
- identify copyright, moral rights, privacy and intellectual property issues and legislation that impact development of activities, including those relevant to Aboriginal and Torres Strait Islander cultures, child protection and trade practices.

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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 Library – Exhibitions and Visitor Programs field of work and include access to:

- access to organisational documentation, equipment and resources relevant to the activity, event or public program
- realistic workplace constraints, such as:
  - budget
  - space limitations
  - resource constraints
  - availability of staff.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB504 Develop exhibition concepts

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to explore potential themes and storylines to inform the overall development of exhibition concepts.

It applies to individuals who explore and develop concepts and ideas for a cultural exhibition, who work autonomously, but in consultation and collaboration with others.

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

Unit Sector

Library – Exhibitions and Visitor Programs

Elements 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 purpose and objectives of exhibitions	1.1 Research characteristics of potential audiences for exhibitions 1.2 Confirm purpose, scope and objectives of exhibitions in consultation with stakeholders 1.3 Develop broad parameters for content, based on objectives, audience needs, community feedback, and collection and organisational parameters
2 Research exhibition concepts	2.1 Research historical, cultural and other influences that impact concept development

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Undertake critical analysis of sources and references to inform concept development 2.3 Identify and source appropriate specialists for assistance 2.4 Explore and adapt relevant ideas from other practitioners or exhibitions with consideration of intellectual property, moral rights and copyright
3 Develop and propose concepts	3.1 Use information collected to develop and expand ideas and concepts 3.2 Test own ideas and approaches against purpose and objectives of exhibitions, as well as ideas from colleagues 3.3 Prepare concept proposals in appropriate format 3.4 Gain required approvals

Foundation Skills

This section describes 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, 2.4	• Interprets and analyses a range of texts to explore ideas and concepts to meet purposes of different exhibitions
Writing	1.2, 1.3, 2.2-2.4, 3.3, 3.4	• Uses clear language, correct spelling and grammar and appropriate terminology to convey information to a range of personnel
Oral Communication	1.2, 2.3, 3.2, 3.4	• Elicits views and opinions of others • Obtains information by listening and questioning • Participates in a verbal exchange of ideas or solutions • Uses clear language to contribute information and express requirements
Navigate the world of work	1.3, 2.4, 3.3, 3.4	• Works independently and collectively in making decisions to achieve organisation outcomes in relation to exhibition concepts • Takes full responsibility for following policies, procedures and regulatory requirements
Interact with others	1.2, 2.3, 3.2, 3.4	• Collaborates and cooperates with others to achieve joint outcomes

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Get the work done	1.1-1.3, 2.1-2.4, 3.1-3.3	• Considers whether others should be involved in decision-making, using collaborative processes as part of the decision-making process • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses formal analytical thinking techniques for identifying issues and generating possible solutions, seeking input from others as required • 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**
BSBLIB504 Develop exhibition concepts	CULEVP504A Develop exhibition concepts	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB504 Develop exhibition concepts

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- apply sound research and analytical skills to inform the development of exhibition concepts
- develop creative exhibition concepts that are designed to achieve the given purpose, scope and 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:

- identify sources of information and research data relevant to collections
- explain processes for drawing links between collections, research data and audience needs
- outline roles of personnel involved in exhibition development process and how these interrelate
- discuss current trends in exhibition development
- explain concepts of themes, sub-themes, storylines and interpretation within exhibition development
- identify copyright, moral rights and intellectual property legislation and issues that impact exhibition concept development
- outline cultural protocols relevant to exhibition concept development, including those for the exhibition of Aboriginal or Torres Strait Islander material
- explain collection and interpretive 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 Library – Exhibitions and Visitor Programs field of work and include access to:

- a collection around which an exhibition concept can be developed
- relevant research materials and information sources
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB505 Develop disaster management plans

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to identify potential risks that could damage or destroy a collection of materials, and develop plans and take actions to eliminate or at least mitigate such risks.

It applies to individuals working in organisations holding significant collections. These include indoor and outdoor sites at museums, libraries, archives, galleries, cultural centres and organisations with records and information.

In large organisations, this role may be undertaken by specialist staff. However in many community-based organisations, generalists, often working with limited supervision such as managers, volunteers or committee members, may be responsible for the development of disaster management plans.

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

Unit Sector

Library – Preventive Conservation

Elements 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 risks to collections	1.1 Identify potential risks to collection material based on historical data, examination of collections and their physical

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ELEMENT	PERFORMANCE CRITERIA
	environment 1.2 Assess risks according to probability and impact on collections 1.3 Identify items of significance in collections and assess risks specific to those
2 Establish mechanisms to address risks	2.1 Identify appropriate mechanisms to reduce or remove risks 2.2 Locate and consult with relevant specialists to determine ways of reducing specific risks 2.3 Document resources, actions and responsibilities for minimising or preventing risks 2.4 Establish and document appropriate measures for priority items
3 Establish procedures in event of disasters	3.1 Develop procedures for responding to disasters 3.2 Define roles and responsibilities of those involved in implementing disaster management plans 3.3 Allocate responsibilities to appropriate team members based on available expertise 3.4 Research potential disaster support networks
4 Finalise disaster management plans	4.1 Source and collate relevant information to include in disaster management plans 4.2 Create structure and format for plans that are logical, user-friendly and clearly understood by key stakeholders 4.3 Develop documentation to support disaster management plans 4.4 Integrate evaluation mechanisms into plans 4.5 Present plans to stakeholders and provide feedback opportunities 4.6 Develop strategies to ensure plans and required staff skills remain current 4.7 Make recommendations for integration of disaster management measures into other relevant organisational plans

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, 2.2, 3.4, 4.1	• Reads strategically and selectively, identifying a purpose before reading, and continually reflecting on the relevance of a text to meet needs • Integrates prior knowledge with new information to predict, construct, confirm, challenge or extend understanding
Writing	2.2-2.4, 3.1-3.3, 4.1-4.7	• Explores complex issues and articulates multi-faceted plans, organising content in a manner that supports the purpose, with format, text type and language to suit the audience
Oral Communication	2.2, 3.3, 3.4, 4.5	• Presents information and ideas clearly and logically to support planning and effectively influence others • Uses active listening skills to enhance understanding, and responds appropriately to constructive feedback
Navigate the world of work	2.2, 3.1, 3.4, 4.1, 4.3, 4.4, 4.6, 4.7	• Takes responsibility for establishing and managing organisational policies and procedures relevant to own role • Works independently and collectively in making decisions to achieve organisational outcomes in the area of disaster management • Ensures knowledge of disaster management strategies and support networks is accurate, comprehensive and current
Interact with others	2.2, 3.3, 3.4, 4.5	• Collaborates with others sharing information to build strong work groups
Get the work done	1.1-1,3, 2.1, 2.3, 2.4, 3.1-3.3, 4.1-4.7	• Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness • Plans work activities of self and others, ensuring compliance with organisational disaster management policies and procedures • Approaches decision-making in diverse ways involving others when appropriate but making unilateral decisions when required • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Accepts responsibility for risk management, applying problem-solving processes to determine solutions • Anticipates events where disaster management plans may be required • Uses main features and functions of digital tools to

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		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**
BSBLIB505 Develop disaster management plans	CULPRE501A Develop disaster management plans	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB505 Develop disaster management plans

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- assess risks to the collection
- develop risk mitigation procedures
- develop a clear and concise disaster management plan for an actual collection or site or environment
- present plan to stakeholders and respond to feedback
- establish strategies to maintain currency of 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:

- identify and discuss types of disasters that might affect collections and particular items in collections
- analyse causes and types of damage to collection material and collections
- analyse risk assessment processes in relation to collections
- analyse procedures used to reduce or remove risk in the relevant work context
- identify support networks that can be used in the event of disaster response and recovery
- analyse significance assessment methodology.

Assessment Conditions

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

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- a collection, cultural material or site for which a disaster management plan can be prepared
- historical data and collection records
- special purpose tools, equipment and materials.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB506 Maintain digital repositories

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to populate and manage digital collections of information resources.

It applies to individuals, working autonomously within established guidelines, with significant technical skills and knowledge in using, maintaining, improving and describing content and context of digital collections according to organisational and system guidelines.

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

Unit Sector

Library – Collection 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 Maintain knowledge of digital repositories	1.1 Research information sources to determine types and functions of digital repositories 1.2 Review organisational procedures on digital repositories to ensure consistency with organisational policies 1.3 Assess risks associated with digital repositories and refer to appropriate personnel as required
2 Manage resources for	2.1 Locate and verify resources to add to the digital repository

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ELEMENT	PERFORMANCE CRITERIA
digital repositories	2.2 Provide information to relevant personnel regarding procedures and permissions for collecting and accessing resources 2.3 Add resources to the digital repository using suitable software applications and equipment 2.4 Maintain digital resources to ensure access and integrity 2.5 Remove resources from the digital repository where required, following organisational procedures
3 Manage metadata for digital repositories	3.1 Create descriptive, technical and administrative metadata for digital repository resources according to organisational policies and procedures 3.2 Edit digital repository metadata 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	1.1-1.3, 2.1, 2.5, 3.2	• Interprets and critically analyses complex text to appropriately apply material to new or existing resources and distinguishes significant information from minor references
Writing	1.2, 1.3, 2.2, 2.3, 3.1, 3.2	• Provides clarity of meaning to directive and instructional text, and conveys detailed, accurate and concise descriptions of complex data
Oral Communication	1.3, 2.2,	• Uses clear and specific language to convey technical and complex information and instructions to colleagues
Numeracy	1.1, 1.2, 2.1, 2.3, 2.4	• Correctly interprets and provides numerical information embedded in complex information sources
Navigate the world of work	1.1, 1.2, 2.2, 2.5, 3.1, 3.2	• Takes full responsibility for following policies and procedures • Ensures knowledge of digital repositories is kept up-to-date to provide quality services
Interact with others	1.3, 2.2,	• Collaborates with others and shares information to optimise efficiency of operations

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Get the work done	1.2, 1.3, 2.3-2.5, 3.1, 3.2	• Accepts responsibility for planning, prioritising and sequencing complex tasks and workload • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Accepts responsibility for risk management, applying problem-solving processes to determine solutions • Fully utilises features of digital tools to complete complex tasks • Uses analytical and lateral thinking to create metadata that anticipates and accommodates access

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB506 Maintain digital repositories	CULICM501A Maintain digital repositories	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB506 Maintain digital repositories

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- add to and remove resources from digital repositories using organisational policies and procedures, and ensuring the access and integrity of these
- create and edit metadata for digital repository 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:

- identify and describe access and preservation standards for digitisation
- discuss copyright, moral rights, digital rights management and intellectual property issues and legislation that impact digital repositories
- describe different digital file formats
- describe digital preservation techniques
- review information management principles for description and access
- maintain knowledge of current trends in digital repositories
- identify and describe licensing agreements covering digital resources
- reference metadata standards and systems used in Australian institutions, such as:
  - Anglo-American Cataloguing Rules (AACR)
  - Australian Government Location Service (AGLS)
  - Dublin Core
  - Machine Readable Cataloguing (MARC) and MARC21
- review organisational procedures regarding digital repositories.

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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 Library – Collection Management field of work and include access to:

- industry-current systems and technologies for digital repositories
- relevant organisational policies, procedures and metadata standards
- special purpose tools, equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB507 Promote literature and reading

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to research and implement strategies that encourage and enhance literature and reading in a wide variety of contexts. Particular emphasis is on improving the literacy of customers by creating environments that provide access to relevant and attractive reading material in a variety of formats to suit a range of ages, reading levels and needs.

It applies to individuals responsible for promoting literature and reading to clients as a way of meeting their needs. It applies in many industries, including libraries, information and cultural services, community services and health. Work is undertaken with limited supervision according to organisational guidelines.

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

Unit Sector

Library – Information 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 Maintain knowledge about literature and reading	1.1 Research promotion of literacy, literature and reading and its importance for an informed society 1.2 Recognise reading levels and tastes of different customer groups

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Maintain a record of key types of publications that provide information about literature 1.4 Source independent, print and electronic publisher reviews about literature 1.5 Use recognised classification systems to physically locate literary works and literary information 1.6 Update own knowledge of a broad range of literary works, publishing trends and formats 1.7 Share information collected on literary works, publishing trends and formats with colleagues
2 Implement a range of strategies to promote literature and reading	2.1 Research methods used to organise and access literature collections 2.2 Develop own strategies to promote literature and reading, including using current or emerging technologies 2.3 Interview and provide advice to customers to meet their literature and reading needs 2.4 Source information to meet customer literature requests 2.5 Identify and assess strategies used by organisations to promote reading, and adapt as appropriate for the organisation 2.6 Recommend purchase of literary works and literary information based on customer requests and analysis of reviews
3 Monitor and evaluate effectiveness of strategies to promote literature and reading	3.1 Analyse usage data to determine effectiveness of strategies 3.2 Track solicited and unsolicited feedback to the organisation regarding literature collections 3.3 Recommend changes to strategies in response to 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	1.1-1.6, 2.1, 2.4-2.6,	• Selects, synthesises and critically evaluates ideas and information from multiple texts, continually reflecting

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	3.1, 3.2	on relevance of texts to meet identified need
Writing	1.3, 1.7, 2.2-2.4, 2.6, 3.1, 3.3	• Uses written text to develop hypotheses, explore complex issues, plan and problem-solve, as well as a functional tool to maintain records, share information and provide advice
Oral Communication	1.7, 2.3, 2.4, 2.6, 3.2, 3.3	• Utilises a range of oral structures to convey precise meaning • Adapts language to audience, context and purpose • Employs active listening skills particularly when conducting interviews in a reader advisory role or sharing information with colleagues
Numeracy	1.5, 1.7, 3.1	• Interprets and utilises mathematical information related to statistical data, trends and classification systems
Navigate the world of work	1.1, 1.5, 1.6, 2.2, 2.5, 3.3	• Works independently and collectively in making decisions to achieve organisation outcomes • Seeks to improve policies and procedures to better meet organisational goals • Takes personal responsibility for following explicit and implicit workplace procedures
Interact with others	1.7, 2.3, 2.4, 2.6, 3.2, 3.3	• Provides support in field of expertise to management team • Cooperates with others and contributes to work practices where joint outcomes are expected
Get the work done	1.2-1.6, 2.1-2.6, 3.1, 3.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses analytical and lateral thinking to review current practices and develop new or improved processes, models and services • Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share relevant information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLIB507 Promote literature and reading	CULINL501A Promote literature and reading	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB507 Promote literature and reading

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- develop, implement and evaluate strategies to promote literature and reading
- meet customer literature requests
- apply information literacy skills when promoting literature and reading
- promote use of an organisation's collections and 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:

- define the concept of literacy and describe the role organisations play in promoting reading
- analyse scope and arrangement of literature collections in libraries and related organisations
- identify relevant literature information sources located in publications such as:
  - blogs
  - catalogues
  - databases
  - websites
- describe and contrast methods for arranging literature collections
- identify several frequently asked literature requests and outline strategies for answering such requests
- identify several literature reference resources and describe their applications
- describe categories and genres into which literature is divided.

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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 Library – Information Literacy field of work and include access to:

- use of special purpose tools, equipment, materials and industry software packages
- access to:
  - literature reference tools and resources
  - current industry systems to research information on literature
  - information about current and emerging technologies to promote literature.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB508 Analyse and describe information resources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to analyse and describe information resources in a range of formats so customers can easily retrieve information.

It applies to individuals who possess significant technical skills and knowledge to analyse and describe information materials according to national and international standards. Work is undertaken autonomously, within established guidelines.

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

Unit Sector

Library – 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 description requirements	1.1 Identify scope and likely use of resources 1.2 Assess customer requirements and expectations, including special needs 1.3 Determine appropriate type and structure of descriptions
2 Analyse resources	2.1 Use analysis and description tools and standards, precedents and techniques appropriate to the nature of the resources, including indexes

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Analyse subject content of resources to clearly distinguish significant information from minor references 2.3 Integrate established general concepts and principles of description and knowledge of relevant standards, authorities and legislations. 2.4 Ensure concepts derived from analysis of resources are appropriate in context of the subject field
3 Describe resources and format descriptions	3.1 Create descriptions that represent concepts appropriately and reflect the overall purpose and intended use of the description 3.2 Conform format of description to general conventions 3.3 Develop a reference structure of descriptors to display relationships to assist customers 3.4 Enhance description to meet identified customer needs
4 Review description practices and procedures	4.1 In consultation with colleagues, review description practices and procedures to ensure they take account of industry developments and meet customer needs 4.2 Take appropriate action within scope of individual responsibility to enhance description practices and procedures 4.3 Check descriptions regularly for internal consistency and compliance with established structure, rules and authorities

Foundation Skills

This section describes language, 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, 4.1, 4.3	• Critically organises, analyses, evaluates and applies content from a wide range of potentially complex information, and distinguishes significant information from minor references
Writing	3.1-3.4, 4.1-4.3	• Utilises sophisticated writing skills to summarise information from multiple sources and express precise meaning appropriate to audience and context
Oral	1.1, 4.1	• Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify

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Communication		information
Numeracy	2.1	• Selects and interprets mathematical information embedded in work with indexing concepts
Navigate the world of work	2.1, 2.3, 3.2, 4.1-4.3	• Works independently and collectively in making decisions to achieve organisational outcomes • Takes full responsibility for following policies, procedures and cataloguing standards • Seeks to improve policies and procedures to better meet organisational goals
Interact with others	1.1, 4.1	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1-1.3, 2.1-2.4, 3.1, 3.3, 3.4, 4.1	• Plans, organises and implements work activities in line with organisational policies and procedures • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Applies analytical processes to resolve technical or conceptual problems • Uses analytical and lateral thinking to create descriptions that anticipate and accommodate ways in which customers may search for resources • 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**
BSBLIB508 Analyse and describe information resources	CULINM501A Analyse and describe information resources	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business Services Training	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		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 BSBLIB508 Analyse and describe information resources

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package version 2.0

Performance Evidence

Evidence of the ability to:

- use tools, standards and communication skills to analyse and describe resources appropriately and satisfy customer requirements
- demonstrate use of current industry systems to analyse and describe a range of different 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:

- apply principles of subject access to a specific resource
- demonstrate application of principles of thesauruses used in indexing
- compare and contrast types of indexes and abstracts
- demonstrate application of abstracting and indexing standards and methods, including descriptions and cross-referencing of access points and descriptors
- describe methods for allocating major and minor descriptors to information resources
- describe methods for matching reference structure to suit customer needs
- describe methods for enhancing subject access through indexing
- evaluate monitoring and review processes for indexes and abstracts.

Assessment Conditions

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

- relevant policies and procedures manuals

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- relevant thesauruses and database programs and resources to index and abstract
- industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB509 Provide subject access and classify material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to analyse and catalogue complex material which requires application of bibliographic organisation methods and the ability to use interpretation and judgement to deviate from precedents where necessary.

It applies to information services professionals with highly developed technical skills who work autonomously to facilitate customer access to information.

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

Unit Sector

Library – 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 Catalogue material	1.1 Analyse subject content of material using knowledge of general concepts and principles of bibliographic control, relevant standards and customer needs 1.2 Create records following organisational standards, precedents and techniques, and according to industry standards 1.3 Evaluate and adapt precedents to meet specified needs 1.4 Select appropriate subject headings and cataloguing tools and

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ELEMENT	PERFORMANCE CRITERIA
	standards 1.5 Construct sufficient headings to enhance access to information using standards and authorities lists 1.6 Format description 1.7 Consult with colleagues to determine systematic and reasonable approaches to cataloguing complex material where no precedents exist
2 Classify material	2.1 Use chosen classification systems to reflect knowledge of principles of organisation 2.2 Select a classification number consistent with classification system that reflects understanding of subject content and provides ready access for customers and staff 2.3 Check shelf list or online catalogue for previously assigned classification numbers for similar items
3 Contribute to maintenance and development of cataloguing practices	3.1 Maintain and apply knowledge of changes in cataloguing practices to enhance cataloguing consistency and quality 3.2 Consult with colleagues regarding issues with cataloguing system operations or procedures and take appropriate action to address problems 3.3 Create and maintain records of materials and holdings according to relevant national and organisational procedures 3.4 Comply with legislation relevant to cataloguing 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, 2.3, 3.1-3.4	• Organises, analyses, evaluates and applies content from a range of structurally complex texts
Writing	1.1, 1.2, 1.5, 1.6, 3.2, 3.3	• Utilises sophisticated writing skills to summarise information from multiple sources and express precise meaning appropriate to audience and context

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Oral Communication	1.7, 3.2	• Employs active listening skills to ensure understanding and expresses ideas and concepts in a manner and form appropriate to the audience
Numeracy	1.2, 1.4, 2.1-2.3, 3.1-3.3	• Identifies and comprehends relevant mathematical information in familiar activities or texts
Navigate the world of work	1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 3.1-3.4	• Works independently and collectively in making decisions to achieve organisational outcomes • Maintains knowledge of cataloguing practices relevant to own role • Takes full responsibility for following policies, procedures and legislative requirements • Seeks to improve policies and procedures to better meet organisational goals
Interact with others	1.7, 3.2	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1, 1.3-1.5, 1.7, 2.2, 3.2	• Plans, organises and implements work activities in line with organisational policies and procedures, and legislative requirements • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Applies analytical processes to resolve technical or conceptual problems • Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking • Identifies precedents and considers how they can be used or adapted to improve customer access to information resources • 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**
BSBLIB509 Provide subject access and classify material	CULINM502A Provide subject access and classify material	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
		Unit moved from Library, Information and Cultural 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 BSBLIB509 Provide subject access and classify material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- construct subject access points and accurately classify material to be catalogued
- analyse subject content for cataloguing and classification purposes
- maintain and apply knowledge of bibliographic and catalogue record components, and cataloguing standards and conventions
- demonstrate a collaborative approach to resolving complex problems
- demonstrate use of current industry cataloguing 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 purpose and function of various cataloguing tools
- select and apply appropriate classification schemes relevant to work context
- demonstrate subject access and control of methods, including:
  - authority control procedures
  - subject headings lists
  - thesauruses
- demonstrate application of authority systems and files
- select and apply common automated cataloguing modules relevant to work context
- critically review catalogue maintenance principles and activities
- compare and contrast ways of modifying and upgrading records to suit customer needs, including:
  - additional access points
  - establishing new authorities

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- analyse precedents and their use to inform cataloguing of complex materials and demonstrate interpretation and judgement to deviate from precedents where necessary
- identify and apply national and international cataloguing standards
- review current industry trends relating to cataloguing and classification processes
- discuss copyright, moral rights and intellectual property issues and legislation relevant to cataloguing practices.

Assessment Conditions

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

- relevant cataloguing standards, policies and procedures documents
- current industry cataloguing and classification tools, equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB510 Use and monitor advanced functions of integrated library management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to use and evaluate the functionality of integrated library management systems (ILMS) at an advanced level and to analyse the interrelated functions of an ILMS, as well as evaluate the systems and services.

It applies to individuals working autonomously, within established policies and procedures, in functional areas of libraries. In some contexts, work may involve supervisory or team leader roles.

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

Unit Sector

Library – 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 Extend expertise in use of ILMS	1.1 Maintain currency of knowledge of basic functions and interrelation of different modules of an integrated library management system 1.2 Research enhanced functions of online catalogues, including web interfaces and applications 1.3 Provide information to customers regarding online catalogue

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ELEMENT	PERFORMANCE CRITERIA
	and circulation systems
2 Use advanced features of ILMS to assist customers	2.1 Use advanced search features of online catalogues to locate information resources for customers 2.2 Use advanced circulation system functionality to resolve complex borrower problems and complaints 2.3 Provide information to customers regarding range of services that may incur costs 2.4 Process financial transactions and provide customers with information about pre-paid service transactions 2.5 Refer complex customer transactions to relevant personnel
3 Use advanced ILMS functions for collection management	3.1 Order and receive library resources using automated acquisitions systems and procedures 3.2 Create records using automated cataloguing systems and procedures 3.3 Create reports and statistical data with different modules
4 Evaluate functionality of ILMS	4.1 Evaluate functions of an existing ILMS in relation to customer and organisational needs 4.2 Source information on current industry trends in relation to ILMS, including potential new systems, upgrades or add-ons 4.3 Consult with relevant personnel and make appropriate recommendations regarding improvements to ILMS

Foundation Skills

This section describes language, 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, 4.1-4.3	• Critically organises, analyses, evaluates and applies content from a range of structurally complex texts
Writing	1.2, 1.3, 2.3, 2.4, 3.1-3.3, 4.2, 4.3	• Accurately records information and completes documentation using required format, terminology and conventions specific to organisational requirements
Oral	1.3, 2.3-2.5, 4.3	• Employs active listening skills to ensure understanding

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Communication		and expresses ideas and concepts in a manner and form appropriate to the audience
Numeracy	2.3, 2.4, 3.3	• Selects and interprets mathematical information embedded in a range of familiar and some less familiar tasks including financial calculations and transactions, statistical reports and cataloguing systems
Navigate the world of work	1.1, 3.1, 3.2, 4.1-4.3	• Maintains currency of knowledge relevant to own role on developments in integrated library management systems • Takes full responsibility for following organisational policies and procedures • Seeks to improve policies and procedures to better meet organisational goals
Interact with others	1.3, 2.3-2.5, 4.3	• Adapts personal communication style to build a positive working relationship, and shows respect for opinions, values and particular needs of others
Get the work done	1.2, 2.1-2.3, 2.5, 3.1-3.3, 4.1, 4.2	• Plans and sequences complex activities, monitors implementation and manages relevant communication • Applies systematic and analytical decision-making processes for complex situations • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Uses problem-solving techniques to identify and analyse issues, to generate possible solutions, seeking input from others as required • 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**
BSBLIB510 Use and monitor advanced functions of integrated library management systems	CULINM503A Use and monitor advanced functions of integrated library management systems	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		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 BSBLIB510 Use and monitor advanced functions of integrated library management systems

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- use basic and advanced features of an ILMS to locate information resources for customers
- conduct basic and advanced online catalogue searches
- provide information to customers in a courteous and helpful manner
- source and evaluate information regarding current industry trends in relation to ILMS
- evaluate functionality of an ILMS and make recommendations regarding new systems, upgrades and add-ons.

Note: If a specific volume or frequency 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 operation of automated library management systems, including interrelation between cataloguing, circulation, online catalogue and acquisitions modules
- describe basic and advanced features of automated library management systems, including customer self-service systems and associated technologies
- discuss implications of relevant workplace policies and procedures in relation to lending and interlibrary loans
- describe procedures for document delivery modules
- describe procedures for handling money and security
- discuss best practice customer service policies and procedures
- analyse impact of relevant legislation on provision of library and information services.

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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 Library – Information Management field of work and include access to:

- relevant organisational policies and procedures manuals
- current industry systems, equipment, tools, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB511 Research and analyse information to meet customer needs

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to provide customers with access to, and an analysis of, diverse and complex sources of information.

It applies to individuals working in public, corporate or institutional libraries, record management units, government departments, tourist information centres, community advisory organisations or other library and information services contexts, who respond to complex information needs, working autonomously with limited guidance from others.

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

Unit Sector

Library – Information 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 Analyse information needs	1.1 Determine complete nature of information needs with reference to relevant documentation or information from customers 1.2 Conduct reference interviews with customers to determine specific information needs, including level, type and amount of information required

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Confirm the level of complexity customers need in their information 1.4 Formulate complex search strategies using sound knowledge of a broad range of potential information sources 1.5 Identify and assess customer expectations in relation to available resources and likely constraints 1.6 Advise customers of likely outcomes of information search and possible delivery options 1.7 Review and revise search terms or topics in consultation with customers
2 Implement strategies to locate difficult to find information	2.1 Consider access to information sources into account when evaluating different search strategies 2.2 Select and prioritise information sources 2.3 Evaluate and select logical and reasonable strategies to locate difficult to find information 2.4 Consult with colleagues, as required, to identify appropriate information sources 2.5 Use effective search techniques to locate relevant information 2.6 Assist customers to actively participate in search processes through practical demonstration of information-seeking skills
3 Ensure quality of customer service	3.1 Assess information obtained for its validity, reliability and suitability in relation to customer requirements and expectations 3.2 Ensure appropriate packaging and presentation of information to meet customer requirements and expectations, ensuring inclusion of relevant support information 3.3 Communicate with customers regarding problems, difficulties, suitable alternatives or follow-up requirements 3.4 Observe cultural sensitivities, ethics, privacy and copyright issues and obligations in meeting customer 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	Description

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	Criteria	
Reading	1.1, 1.3, 1.7, 2.2, 2.3, 3.1, 3.2, 3.4	• Critically organises, evaluates and applies content from a range of structurally complex texts
Writing	1.2, 1.4, 1.6, 1.7, 2.1, 2.2, 2.4, 2.5, 3.2-3.4	• Prepares documentation and correspondence using clear language and correct spelling and terminology
Oral Communication	1.1-1.3, 1.5-1.7, 2.4, 2.6, 3.3	• Effectively participates in verbal exchanges using active listening and questioning to clarify information • Clearly explains detailed information using language, tone and pace appropriate to audience
Navigate the world of work	1.1, 1.4, 2.1, 3.1, 3.2, 3.4	• Takes personal responsibility for following explicit and implicit policies, procedures and regulatory requirements
Interact with others	1.1-1.3, 1.5-1.7, 2.4, 2.6, 3.3, 3.4	• Adapts personal communication style to build a positive working relationship and show respect for opinions, values and particular needs of others
Get the work done	1.4, 1.5, 1.7, 2.1-2.3, 2.5, 3.1-3.4	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Systematically gathers and analyses all relevant information and evaluates options to make decisions about the most efficient and effective way of responding to a range of complex information requests from customers • Approaches decision-making in diverse ways involving others when appropriate but making unilateral decisions when required • Fully utilises features of digital tools to complete complex tasks • Uses digital tools safely, legally and ethically when gathering, storing, accessing or sharing information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB511 Research and analyse information to meet customer needs	CULINS501A Research and analyse information to meet customer needs	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
		Unit moved from Library, Information and Cultural 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 BSBLIB511 Research and analyse information to meet customer needs

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse information to ensure suitability to meet customer needs
- apply knowledge of the organisation's reference, research and general collections
- apply knowledge of types and scope of databases and other accessible reference tools
- define, locate, analyse and evaluate information
- demonstrate effective interviewing, communication and negotiation with customers about information needs
- efficiently and effectively respond to complex and varied information requests
- demonstrate effective search techniques using a range of print and electronic information sources and tools
- demonstrate working within time constraints that reflect industry practice 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:

- describe scope and range of information sources available in print and electronic formats, including databases and technologies, such as current and emerging web applications
- analyse various techniques for searching and retrieving information from a range of sources, including the internet and other electronic sources
- compare and contrast strategies for obtaining information from external agencies or specialist organisations
- describe a range of available delivery options for presentation of information resources
- outline legal considerations relating to accessing information sources
- define bibliographic standards
- evaluate several reference sources and databases, both print and online

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- identify and describe protocols associated with culturally sensitive material, including Aboriginal or Torres Strait Islander cultural material.

Assessment Conditions

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

- opportunities for interaction with others to reflect the communication and negotiation aspects of this unit
- access to:
  - relevant policies and procedures documents
  - a range of information sources and information systems
  - special purpose tools, equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB512 Develop and maintain community and stakeholder relationships

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to develop and maintain relationships with people and organisations in local communities through regular and ongoing consultation to maintain the quality of service provision.

It applies to individuals who work in any industry or community context where there is a need for a proactive approach to establishing and building networks and relationships between organisations and stakeholders and who operate autonomously, often with managerial responsibility.

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

Unit Sector

Library – 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 Plan stakeholder consultation	1.1 Review and assess current and potential stakeholders to determine needs, interests, and priorities and trends, in consultation with colleagues 1.2 Identify key stakeholders, their representatives and ways to establish and maintain links

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Research and maintain a collection of current relevant information on stakeholders 1.4 Check organisational plans for appropriate reference to interaction with stakeholders 1.5 Ensure planning takes account of relevant internal and external factors
2 Establish productive stakeholder relationships	2.1 Use a range of formal and informal strategies to facilitate relationships between stakeholders and own organisation 2.2 Identify and assess strategies for formal links between own organisation and key stakeholders 2.3 Implement strategies likely to be successful in establishing productive relationships with stakeholders 2.4 Determine purpose and parameters of specific consultations, and brief participants accordingly 2.5 Integrate information from stakeholder consultations into organisational planning and share with relevant colleagues in a timely manner 2.6 Monitor and evaluate stakeholder relationships and take appropriate action to continuously improve them, in consultation with colleagues
3 Represent organisation to local community	3.1 Communicate organisational role accurately, confidently and clearly to promote stakeholder awareness 3.2 Promote organisation to external bodies that have a stake in its role, funding and operations

Foundation Skills

This section describes language, 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	• Interprets and analyses complex documents making connections to inform planning and strategy
Writing	1.1, 1.3, 2.1, 2.4, 2.5, 2.6, 3.1, 3.2	• Employs appropriate vocabulary and tone to effectively communicate to different audiences • Uses appropriate forms and conventions to convey

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		information clearly
Oral Communication	1.1, 1.2, 2.1, 2.4-2.6, 3.1, 3.2	• Articulates clearly and persuasively, listening to opinions of others and altering responses accordingly • Participates in a verbal exchange of ideas/solutions and uses detailed, clear language to clarify and present information according to requirements and audience
Navigate the world of work	1.1, 1.3, 1.4, 2.5, 2.6	• Ensures knowledge of community networks relevant to own role is accurate, comprehensive and current • Works independently and collectively in making decisions to achieve organisational outcomes • Seeks to improve policies and procedures relevant to own role to better meet organisational goals
Interact with others	1.1, 1.2, 2.1, 2.4-2.6, 3.1, 3.2	• Uses appropriate conventions and protocols when communicating with colleagues and external stakeholders • Develops and implements communications strategies with internal and external persons to build rapport • Plays a lead role in collaborating, consulting and cooperating with stakeholders to promote an understanding of the organisation's role
Get the work done	1.1, 1.2, 1.4, 1.5, 2.1-2.6	• Plans, organises, implements and reviews systems and processes for effective engagement with stakeholders • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses problem-solving techniques to identify and analyse issues • Uses analytical and lateral thinking to identify opportunities to engage with and maximise involvement of stakeholders • Uses 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**
BSBLIB512 Develop and maintain community and	CULREL501A Develop and maintain community 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
stakeholder relationships	stakeholder relationships	Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB512 Develop and maintain community and stakeholder relationships

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- proactively develop, establish and maintain relationships with stakeholders in ways that support the needs of own organisation
- facilitate effective consultation with a broad range of 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 role and nature of promotion, advocacy and networks in the library and information and museums and galleries sectors
- explain nature and range of stakeholder groups, including special needs and cultural considerations
- identify features, costs and benefits of different consultation mechanisms
- describe networking techniques and strategies
- describe planning and organisational techniques for community consultations
- outline legal issues relevant to community/stakeholder consultation, including relevant health and safety requirements
- outline governance obligations associated with the organisation and its stakeholders.

Assessment Conditions

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

- strategic plans and relevant policies and procedures manuals

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- resources to implement consultation processes
- project or work activities conducted over a period to time that allow involvement of and interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB513 Monitor compliance with copyright and licence requirements

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to monitor compliance with copyright and licence requirements for collections held by Australian archives, galleries, libraries and museums.

It applies to individuals who are responsible for monitoring the organisation's compliance with copyright and licence requirements regarding collections held in Australian archives, galleries, libraries and museums, and who operate autonomously but in consultation with other colleagues and broader stakeholders.

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

Unit Sector

Library – Regulation, Licensing and Risk

Elements 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 compliance with copyright legislation	1.1 Research information sources to keep abreast of information about copyright relevant to libraries and cultural institutions 1.2 Review organisational procedures to ensure consistency with copyright obligations and organisational policy 1.3 Identify gaps in procedures to be addressed, and take action

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ELEMENT	PERFORMANCE CRITERIA
	accordingly 1.4 Seek specialist advice as required 1.5 Advise relevant personnel about legal and economic implications of copyright infringement and other legislative obligations
2 Monitor licences for digital rights management	2.1 Identify materials within organisations that require licences 2.2 Research organisational protocols regarding licences and implications for digital rights management 2.3 Source information regarding licence agreements between own organisation and vendors of electronic resources 2.4 Explain to customers responsibilities in relation to licence and digital rights management
3 Assess risks associated with private support by sponsors and donors	3.1 Review organisational procedures for accepting donations and sponsorship and culturally sensitive material to ensure consistency with organisational policy 3.2 Identify copyright and licence risks associated with these practices 3.3 Provide advice about identified risks 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, 2.1-2.3, 3.1	• Interprets complex information from sources to identify relevant and key information
Writing	1.2, 1.4, 1.5, 2.4, 3.3	• Articulates complex ideas in language appropriate to intended audience • Employs clear and coherent language to provide advice and present different strategies
Oral Communication	1.4, 1.5, 2.4, 3.3	• Uses an appropriate tone and vocabulary to express complex ideas to different audiences
Navigate the	1.1-1.3, 1.5, 2.1-2.4,	• Ensures knowledge of legislation and regulations relevant to role is accurate, comprehensive and current

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world of work	3.1, 3.2	• Ensures policies, procedures, systems and processes meet legislative and regulatory requirements and take account of cultural protocols
Interact with others	1.4, 1.5, 2.4, 3.3	• Identifies and uses appropriate conventions and protocols when communicating with colleagues and customers • Collaborates with others, sharing information to build strong work groups
Get the work done	1.2-1.5, 2.1-2.3	• Plans, organises, implements and reviews systems and processes to manage compliance within relevant regulations and legislation • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make decisions • Accepts responsibility for risk management in areas relevant to own role, applying problem-solving processes to determine solutions • Uses problem-solving techniques to identify and analyse issues • 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**
BSBLIB513 Monitor compliance with copyright and licence requirements	CULRSK501A Monitor compliance with copyright and licence requirements	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to Business Services Training Package.	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 BSBLIB513 Monitor compliance with copyright and licence requirements

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- source information about copyright relevant to an organisation
- thoroughly review policies, procedures and licences to ensure compliance with legislation
- conscientiously follow procedures to minimise risk of infringements of copyright and licence 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:

- identify relevant copyright and licensing laws and regulations relating to an organisation
- explain digital preservation
- outline licensing and role of collecting societies
- explain open source copyright licences
- identify organisational policies, protocols and procedures on copyright and licences
- outline principal features of the Copyright Act 1968 (Commonwealth) and Copyright Regulations 1969 and how they are applicable
- explain the rights of copyright owners, including digital rights management
- identify sources of information and advice on copyright
- explain protocols for handling culturally sensitive material, including Aboriginal and Torres Strait Islander cultural material.

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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 Library – Regulation, Licensing and Risk field of work and include access to:

- relevant legislation and regulations
- organisational policies and procedures
- agreements and licences
- computer resources for review of policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB601 Research and document collection material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to research, describe and document collection material.

It applies to individuals who work autonomously within established guidelines and apply significant judgement and specialised knowledge to achieve outcomes.

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

Unit Sector

Library – Collection 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 Describe collection material	1.1 Identify collection material in line with industry guidelines and organisational procedures 1.2 Establish the relationship of material to other collection items and the significance of this relationship using information sources 1.3 Consult with key stakeholders to confirm information and assessment
2 Record collection information	2.1 Articulate significance of collection material in an appropriate format and in sufficient detail in descriptions to meet

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements 2.2 Describe in detail the condition of items and their conservation needs 2.3 Alert relevant personnel to conservation needs as required 2.4 Enter information in records according to organisational procedures and guidelines
3 Complete accession details	3.1 Record accession details 3.2 Allocate accession numbers and record on collection material according to organisational procedures and guidelines 3.3 Record accession numbers in the record-keeping system 3.4 Check record-keeping system and collection material 3.5 In consultation with relevant personnel, review and revise procedures 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, 2.4, 3.2-3.5	• Researches and analyses complex conceptual texts within broad industry contexts
Writing	2.1, 2.2, 2.4, 3.1-3.5	• Prepares information, incorporating evaluation of information and specialised and cohesive language in a format and style appropriate to a specific audience
Oral Communication	1,3, 2.3, 3.5	• Elicits views and opinions of others and obtains information by listening and questioning • Participates in a verbal exchange of ideas/solutions and uses inclusive and collaborative techniques to clarify and present information according to requirements and audience
Numeracy	2.4, 3.1-3.4	• Manipulates numerical accession systems to document accession details
Navigate the world of work	1.1, 1.3, 2.1, 2.4, 3.2, 3.5	• Takes responsibility for implementing and reviewing policies, procedures and processes in accordance with organisational requirements

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		• Works independently and collectively in making decisions to achieve organisation outcomes
Interact with others	1,3, 2.3, 3.5	• Collaborates and negotiates with others to achieve outcomes
Get the work done	1.2, 1.3, 2.1, 2.2, 2.4, 3.1-3.5	• Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others • Identifies key factors that impact decisions and their outcomes, drawing on experience and decision-making strategies • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses digital technologies and systems to locate information, enter data and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB601 Research and document collection material	CULCNM601A Research and document collection material	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB601 Research and document collection material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- describe in detail a range of collection material
- apply knowledge of organisational procedures and guidelines to describe and document collection 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:

- identify subject matter experts and sources of expert advice related to collection material
- research and evaluate information sources
- analyse and assess concepts of significance, and significance assessment methodology
- outline handling and examination techniques
- interpret organisational procedures and procedures that apply to identification, description and documentation of collection material
- assess copyright, moral rights and intellectual property issues and legislation and their impact on identification, description and documentation of collection material
- identify and interpret cultural protocols for examining, identifying and reporting on collection material, including those associated with Aboriginal or Torres Strait islander cultural material
- explain record-keeping 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 Library – Collection Management field of work and include access to:

- relevant policies and procedures manuals
- collection material to be identified, described and documented
- a collection
- stakeholders.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB602 Develop and monitor procedures for the movement and storage of collection material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to develop and monitor procedures for the movement and storage of collection material.

It applies to individuals who work autonomously within established guidelines, and often as a team leader.

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

Unit Sector

Library – Collection 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 handling, moving and storing collection material	1.1 Assess key information about collection material 1.2 Assess internal and external factors that impact moving and storing collection material 1.3 Integrate current industry best practice in procedure development 1.4 Locate and consult with stakeholders on complex matters of movement and storage

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Identify and address legal, insurance and other administrative requirements impacting handling, moving and storing collection material 1.6 Identify and assess work health and safety issues and legislative requirements 1.7 Document procedures for moving and storing collection material
2 Manage operations	2.1 Organise and monitor movement and storage arrangements according to agreed procedures and work requirements 2.2 Check movement and storage of collection material against schedules and allocated budgets, and take action to address problems 2.3 Evaluate information records to ensure completeness, currency, accuracy and compliance with legal, ethical and cultural constraints 2.4 Make adjustments and enhancements to record-keeping formats and systems based on ongoing review of records and feedback from users
3 Maintain procedures for moving and storing collection material	3.1 Consult with colleagues to obtain feedback on movement and storage procedures 3.2 Update procedures based on feedback and industry 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	1.1-1.3, 1.5, 1.6, 2.2-2.4	• Analyses and interprets a wide range of information for incorporation into organisational practices and procedures
Writing	1.3, 1.5, 1.7, 2.4, 3.2	• Develops and updates detailed procedures which clearly and concisely define organisational systems and practices • Develops documents using language understood by target audience

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Oral Communication	1.4, 1.5, 2.4, 3.1	• Elicits views and opinions of others and obtains information by listening and questioning • Participates in a verbal exchange of ideas/solutions and uses inclusive and collaborative techniques to clarify and present information according to requirements and audience
Numeracy	2.2-2.4	• Interprets and uses budgets to meet required outcomes • Works effectively with numerical recordkeeping systems to manage and monitor storage collection materials and operations
Navigate the world of work	1.3, 1.5-1.7, 2.1-2.3, 3.1, 3.2	• Works autonomously making high level decisions to achieve and improve organisational goals • Develops and implements strategies to ensure organisational policies, procedures, timelines and regulatory requirements are met • Monitors and reviews organisation's policies, procedures and adherence to legislative requirements to implement and manage change
Interact with others	1.4, 1.5, 2.4, 3.1	• Uses a variety of strategies to build and maintain effective working relationships
Get the work done	1.1-1.7, 2.1-2.4, 3.1, 3.2	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Plans, organises, implements and reviews systems and processes to manage compliance within relevant regulations and legislation • Accepts responsibility for planning, prioritising and sequencing complex tasks and workload • Gathers and analyses data and seeks feedback to improve plans and processes • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Uses problem-solving techniques to identify and analyse issues • Uses 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**

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Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLIB602 Develop and monitor procedures for the movement and storage of collection material	CULCNM602A Develop and monitor procedures for the movement and storage of collection material	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB602 Develop and monitor procedures for the movement and storage of collection material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- develop procedures for moving and storing collection material
- implement and monitor procedures for moving and storing collection material
- integrate into procedures, internal, external and technical issues that impact movement and storage of collection 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:

- assess copyright, moral rights and intellectual property legislation and issues that impact moving and storing collection material
- identify and interpret cultural protocols that affect movement and storage of material, including Aboriginal or Torres Strait Islander material
- outline legal and administrative requirements for moving and storing collection material
- interpret procedures and practices for protection, transportation, storage and security of collection material
- explain safety legislation and requirements that impact moving and storing collection material
- describe technical and conservation issues associated with moving and storing collection material.

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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 Library – Collection Management field of work and include access to:

- relevant policies and procedures manuals
- a collection, for which procedures can be planned.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB603 Contribute to collection management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to assist with the selection, acquisition and evaluation of collections and resource materials, and the development of policies and procedures that guide this work.

It applies to individuals involved in managing collections in a library or information services context to meet stakeholder needs, working autonomously but in consultation with other colleagues and wider stakeholders.

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

Unit Sector

Library – Collection 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 use of collections	1.1 Evaluate usage data as basis for collection policies, to reflect and predict client demands and changing needs 1.2 Source information on current and emerging trends and formats relevant to customer needs in relation to collections
2 Apply information about collection strategies	2.1 Interpret and apply elements of collection management policies in libraries and information services organisations

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ELEMENT	PERFORMANCE CRITERIA
and policies	2.2 Research contemporary practice and policy issues affecting collection management 2.3 Investigate emerging trends and technologies, including trends in publishing and their potential for providing access to resources 2.4 Source information about supply options for library resources 2.5 Contribute to development of collection strategies and policies that meet organisational objectives and customer needs
3 Assist with selection, acquisition and disposal of materials	3.1 Develop proposals for selecting, acquiring and disposing of material 3.2 Assist in assessment of proposals according to organisational collection management policy 3.3 Establish and maintain processes to review collections in line with collection strategies and policies 3.4 Make recommendations on allocation of funds for acquisition of information resources 3.5 Use selection tools to develop details for acquisition of information resources 3.6 Follow organisational procedures for acquisition of information resources 3.7 Participate in weeding and disposal of materials according to established policies and practices 3.8 Participate in review of acquisition procedures and make recommendations for improvements
4 Monitor contractor performance	4.1 Monitor performance of contractors engaged to provide outsourced services 4.2 Integrate performance of contractors in selection and acquisition process 4.3 Refer issues 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

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Reading	1.1, 1.2, 2.1-2.4, 3.2, 3.3, 3.5-3.8, 4.1, 4.2	• Synthesises and evaluates information from a broad range of complex texts and applies this knowledge to improve work practices and collections
Writing	1.1, 1.2, 2.4, 2.5, 3.1-3.5, 3.8, 4.3	• Summarises complex information and conveys sophisticated and original ideas appropriately for context and audience
Oral Communication	2.5, 3.2, 3.4, 3.8, 4.1, 4.3	• Consults and negotiates with customers, colleagues and contractors using detailed and clear language to contribute information and articulate ideas, and elicits views and opinions of others through active listening and questioning techniques
Numeracy	1.1, 2.3, 2.4, 3.4, 4.1	• Collect and review statistical data related to collection usage and effective allocation of financial resources
Navigate the world of work	1.2, 2.1-2.3, 2.5, 3.2, 3.3, 3.6-3.8	• Ensures knowledge of collection management issues and trends relevant to role is accurate, comprehensive and current • Works independently and collectively in making decisions to achieve organisational outcomes • Seeks to improve policies and procedures to better meet organisational goals
Interact with others	2.5, 3.2, 3.4, 3.8, 4.1, 4.3	• Identifies and uses appropriate conventions and protocols when communicating with colleagues and external stakeholders • Provides feedback to others to improve workgroup performance • Provides support in field of expertise to management team
Get the work done	1.1, 2.4, 2.5, 3.1-3.5, 3.7, 3.8, 4.2, 4.3	• Accepts responsibility for planning, sequencing and monitoring complex tasks and workload, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness • Evaluates effectiveness of systems and processes to inform decisions on how to implement improvements • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses problem-solving techniques to identify and analyse issues • Uses analytical and lateral thinking to review practices and suggest improvements • Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLIB603 Contribute to collection management	CULICM601A Contribute to collection management	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB603 Contribute to collection management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse usage data
- apply knowledge of collection strategies and policies that address requirements and constraints in specific workplace contexts
- make acquisition and disposal recommendations based on detailed analysis
- develop recommendations that address selection criteria for a variety of collections and formats
- demonstrate the ability to monitor the performance of contractors.

Note: If a specific volume or frequency 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 current and emerging trends in relation to libraries and publishing
- review selection, acquisition and de-selection processes and procedures
- identify and analyse issues that impact collection management, such as:
  - Copyright Act
  - statements on free access to information
  - UNESCO's Public Library Manifesto
  - Archives Act
- review collection management policies and processes for selecting, weeding and stocktaking
- discuss, in-depth, information services trends and 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 Library – Collection Management field of work and include access to:

- a collection, for which management strategies and policies may be managed
- relevant policies and procedures manuals and collection usage data
- special purpose tools, equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB604 Extend own information literacy skills to locate information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to research, analyse and communicate information, ideas and concepts at a complex level, as well as evaluate and continuously improve personal information literacy skills to optimally service requests for information from customers.

It applies to individuals operating autonomously with limited guidance from others, in any industry sector with particular relevance to those working in the library and information services sectors. It also applies to occupations required to use technology to locate authoritative information for customers from local and other sources.

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

Unit Sector

Library – Information 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 Apply information literacy skills to meet needs	1.1 Refine understanding of information literacy concepts and what constitutes an information literate person 1.2 Determine exact nature and extent of information needs 1.3 Develop effective search strategies and select appropriate

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ELEMENT	PERFORMANCE CRITERIA
	search tools to locate information 1.4 Assess usefulness and relevance of information resources in relation to customer requests 1.5 Evaluate search results and adjust search strategies to meet information needs
2 Provide customers with search results	2.1 Critically analyse search results and select relevant information to meet purpose 2.2 Compile reference lists and bibliographies of relevant information resources following standard referencing styles 2.3 Select appropriate communication methods for presenting information to customers based on nature and purpose of requests and intended audience 2.4 Communicate with customers in relation to information requests according to organisational policies 2.5 Acknowledge copyright and licensing issues related to access and use of information
3 Evaluate own work and skills	3.1 Seek feedback from colleagues regarding own information literacy skills 3.2 Plan and implement strategies and opportunities to support lifelong learning 3.3 Evaluate own information literacy skills against own goals 3.4 Update knowledge of current and emerging technologies that impact information literacy 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	• Reflects on own performance and seeks feedback from others to improve future performance • Identifies own learning goals and strategies to achieve goals
Reading	1.1-1.3, 1.5, 2.1-2.5,	• Evaluates credibility and relevance of texts to meet needs, integrates prior knowledge with concepts from

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	3.1, 3.4	multiple sources and recognises distinguishing structures, layout, features and conventions of a broad range of complex text types as an aid to locating information
Writing	2.2-2.5, 3.1, 3.2	• Utilises text type, structure and language that is accurate and effective to suit audience and need and organises content appropriate for purpose and context
Oral Communication	1.2, 2.3, 2.4, 3.1	• Utilises active listening strategies to maintain understanding and determine information requirements and conveys precise meaning when providing information
Navigate the world of work	1.1, 2.2, 2.5, 3.4	• Takes full responsibility for following policies, procedures and legislative requirements • Maintains currency of own knowledge in relation to own role
Interact with others	1.2, 2.3, 2.4, 3.1	• Establishes and uses appropriate conventions and protocols when communicating with customers
Get the work done	1.2-1.5, 2.1-2.3, 3.3	• Accepts responsibility for planning and sequencing complex tasks and workload • Systematically gathers and analyses all relevant information and evaluates options to make decisions in response to information queries from customers • Uses problem-solving techniques to identify and analyse issues • Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB604 Extend own information literacy skills to locate information	CULINL601A Extend own information literacy skills to locate information	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural Services Training Package to	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
		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 BSBLIB604 Extend own information literacy skills to locate information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- select and adapt search strategies and tools for the purpose
- source and present varied complex information, ideas or concepts
- evaluate search results and take action to enhance final presentation to customer
- implement planned strategies to develop and extend own information literacy skills
- use complex and contemporary technology to provide information in response to customer 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:

- compare and contrast concepts of information literacy and the information literate person
- analyse a range of information sources and technologies available to meet a wide range of information needs
- identify copyright, moral rights and intellectual property issues and legislation that impact research, use and distribution of information
- describe a broad range of information and resources available for development of information literacy skills
- evaluate professional development opportunities and career development strategies in relevant work context
- discuss principles of lifelong learning and how they relate to information literacy
- discuss role of information literacy in different occupations.

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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 Library – Information Literacy field of work and include access to:

- use of special purpose tools, equipment, materials and industry software packages
- access to:
  - a range of print and electronic information sources
  - industry-current systems and technology.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBLIB605 Analyse and describe specialist and complex material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes skills and knowledge required to apply creative, whole systems thinking to cataloguing, classification, indexing, abstracting or otherwise analysing and describing specialist and complex material. Complexity may be created by the wide range of material to be considered, the depth of subject field knowledge required, and the wide scope of cataloguing systems and tools to be applied.

It applies to individuals with highly developed information service technical skills and knowledge, who work autonomously, and are required to analyse and describe specialised and complex material.

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

Unit Sector

Library – 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 Review specialist and complex material	1.1 Use methods of description for specialist and complex material that reflect principles of bibliographic control, relevant standards and customer needs 1.2 Analyse material to reflect in-depth knowledge of customer needs and contexts, subject area, and range of analysis and

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ELEMENT	PERFORMANCE CRITERIA
	description methods that may be applied 1.3 Derive concepts from analysis that reflects awareness of current industry practice and standards
2 Develop descriptions for specialist and complex material	2.1 Select terminology to represent concepts based on in-depth knowledge of suitable headings in subject area, or new headings, according to accepted industry practice 2.2 Establish authority files for new headings that are devised and maintained according to accepted industry practice 2.3 Describe material for which there are no precedents 2.4 Check descriptions meet relevant industry standards
3 Enhance systems for describing material	3.1 Use knowledge of general developments in library and information services practice and organisational priorities to contribute to enhancement of systems 3.2 Recommend expansion or enhancement of organisational systems for describing material 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, 2.2, 2.4, 3.1	• Critically organises, analyses, evaluates and applies content from a range of highly specialised and complex texts
Writing	1.1-1.3, 2.1-2.3, 3.1, 3.2	• Communicates complex relationships between ideas and information requiring wide-ranging analysis and description methods and matching style of writing to purpose and audience
Oral Communication	3.2	• Expresses ideas and concepts clearly and succinctly
Navigate the world of work	1.1-1.3, 2.1, 2.2, 2.4, 3.1, 3.2	• Takes full responsibility for following organisational policies and procedures and for complying with industry standards • Seeks to improve policies and procedures to better meet organisational goals

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Interact with others	3.2	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1-1.3, 2.1, 2.3, 3.1, 3.2	• Applies systematic and analytical decision-making processes for complex situations • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses analytical and lateral thinking to review practices and suggest improvements • Applies innovative systems of analysis, description and classification to optimise use of information • Uses main features and functions of digital tools to complete work tasks and access information • Uses problem-solving techniques to identify and analyse issues

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBLIB605 Analyse and describe specialist and complex material	CULINM601A Analyse and describe specialist and complex material	Updated to meet Standards for Training Packages Unit moved from Library, Information and Cultural 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 BSBLIB605 Analyse and describe specialist and complex material

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse and describe a range of specialist and complex material using current industry systems and tools
- apply metadata knowledge to analysis of specialist and complex materials and resources
- plan and carry out complex cataloguing and description tasks, applying knowledge of cataloguing and classification principles
- contribute to enhancement of current 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 different customer groups, their specialist information needs, and types of libraries and information agencies
- describe a variety of contexts in which users need access to information, and recommend ways to improve this access
- critically review techniques and protocols for creating appropriate information description and classification systems
- evaluate various ways of maximising interface between technology and information in developing useful systems of description and classification
- analyse and discuss copyright, moral rights and intellectual property issues and legislation that apply to analysis and description of materials in a wide range of contexts
- describe specialist cataloguing and classification principles
- describe processes used for indexing and abstracting
- review application of national and international standards in specific cases that highlight precedents, interpretations and 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 Library – Information Management field of work and include access to:

- special purpose tools and equipment
- specialised and complex materials
- organisational systems for describing material
- industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent.
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to maintain patient records within an existing medical records management system, under the supervision of a senior receptionist or practice manager.

It applies to individuals who apply a broad range of competencies in various medical administration contexts. They are skilled operators who are expected to exercise discretion and judgement in accessing and maintaining patient records while fully respecting patient privacy and the confidentiality of their details.

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

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify and clarify	1.1 Determine own role and responsibilities within patient

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ELEMENT	PERFORMANCE CRITERIA
own role and procedures for patient recordkeeping	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 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 records according to organisational policy and procedures
3. Help maintain records	3.1 Make required checks of patient records 3.2 Carry out archiving of patient records as required 3.3 Transfer patient records 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 procedures and medical data

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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 Communication	1.1, 1.3, 4.2	• Uses specific vocabulary and active listening and questioning techniques to confirm understanding
Navigate the world of work	1.1, 2.3, 2.5, 3.3	• Identifies and works within own roles and responsibilities according to organisational and legislative requirements
Interact with others	1.1, 1.3, 3.3, 4.2	• Uses appropriate practices and protocols for workplace communication • Collaborates with others to achieve results in immediate work context
Get the work done	1.1, 2.1, 2.5, 3.1-3.3, 4.1, 4.2	• Plans and sequences workload to ensure tasks are completed in a timely manner • Uses analytical skills to determine recommendations for improvement to established processes and procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMED303 Maintain patient records Release 2	BSBMED303 Maintain patient records Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBMED303 Maintain patient records

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent.
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- use a recordkeeping system to create, access, store and maintain accurate records, according to organisational and legislative requirements
- identify and recommend improvements to recordkeeping system or own work practices
- communicate with relevant people about patient records.

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

Knowledge Evidence

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

- outline relevant legislation, standards and/or codes of practice that affect patient recordkeeping
- explain workplace policies and procedures related to patient recordkeeping, including privacy and confidentiality
- describe the process used to set up and maintain a patient record
- explain how coding systems help users to access and to maintain patient records.

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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:

- a recordkeeping system
- documented procedures
- case studies and, where possible, real situations
- office equipment and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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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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

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

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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

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

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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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Links

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BSBMKG417 Apply marketing communication across a convergent industry

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to work effectively within the convergent marketing communication industry.

It applies to individuals working in a variety of marketing communication roles utilising skills and knowledge from marketing, advertising, public relations and/or convergent media sectors to achieve outcomes.

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

Unit Sector

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 the convergent environment	1.1 Review and identify the role of the traditional siloed sectors to client requirements 1.2 Identify the potential points of integration 1.3 Establish the role of the customer within the convergent environment 1.4 Confirm and ensure that messages can be unified across an

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ELEMENT	PERFORMANCE CRITERIA
	integrated offering 1.5 Identify relevant and current legislation, regulations and policies that may impact on marketing within the convergent environment
2. Prepare cross sector marketing tools and techniques	2.1 Identify and evaluate tools and techniques from traditional sectors to the integrated marketing communication environment 2.2 Create convergent tools and techniques suitable for use within a divergent media environment 2.3 Create tools and techniques suitable for use within a customer-centric environment 2.4 Review and confirm the fit-for-purpose and cost effectiveness of relevant tools and techniques
3. Apply convergent marketing communications	3.1 Select and utilise integrated, cross sector and media divergent marketing communication solutions to meet client requirements 3.2 Identify and engage the use of sector and technology specific experts where appropriate 3.3 Establish channels to empower and respond rapidly to customer perspectives 3.4 Establish and maintain expert and business networks relevant to marketing communication convergence

Foundation Skills

This section describes language, 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 interprets textual information to establish current industry and project status from relevant information
Writing	1.3, 1.4	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	3.2	• Presents information and seeks advice using language appropriate to audience
Numeracy	2.1-2.4	• Identifies and interprets data from a range of sources

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		• Use testing and data analysis to establish and test systems, monitor results and weigh costs
Navigate the world of work	1.5, 2.2, 2.3	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	3.2-3.4	• Selects and uses appropriate conventions and protocols when communicating with internal and external parties to seek or share information • Works positively with those from other disciplines to achieved desired outcomes for organisation and clients
Get the work done	1.1-1.5, 2.1-2.4, 3.1-3.4	• Plans and organises data categories, tasks and workloads 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; creating new tools and techniques where appropriate • Evaluates outcomes of decisions to identify opportunities for improvement • Uses and manipulates digital technology to create, extend and enhance job role, products and capacity to deliver effective service design

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG417 Apply marketing communication across a convergent industry	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 BSBMKG417 Apply marketing communication across a convergent industry

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- Identify the convergent environment for marketing communication in establishing a client solution, including:
  - reviewing the traditional roles and client groups serviced by the marketing, advertising and public relations sectors
  - utilising the impact of capacity in communications technology
  - utilising the impact of ubiquitous enabled mobile devices
  - integrating the rise in 'customer-centric' and the 'empowered customer' in client solutions
- develop client and customer messaging that can be engaged by a target group across multiple distribution points
- create fit-for-purpose tools, techniques and solutions that are effective within a convergent media environment
- establish processes that empower customers
- work with client and customers to implement an integrated solution within a highly iterative environment
- engage effectively with experts and others within the 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:

- identify the characteristics and points of difference between traditional and convergent approaches to marketing communication
- explain how customers take a central and empowered role within convergent marketing
- list the impact of convergence on the traditional siloed industry

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- identify the current key technologies and distributed services that impact on convergent solutions
- list the type of experts and business networks appropriate to a convergent marketing solution
- list relevant and current legislation, regulation and organisational policy to the field of marketing communication.

Assessment Conditions

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

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- industry software packages and apps.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG418 Develop and apply knowledge of marketing communication industry

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to research, analyse and apply knowledge within the marketing communication industry with due consideration to legal and ethical constraints and the digital communication convergent environment.

It applies to individuals who work in entry-level positions with a general knowledge of the structure, organisation and function of the marketing communication 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 – 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 knowledge of the marketing communications industry	1.1 Identify and access sources of information on the marketing communication industry 1.2 Seek information on the structure and operation of the marketing communication industry 1.3 Obtain information on marketing communication 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 marketing communication industry 2.2 Apply information on employment opportunities and obligations in everyday activities related to typical work roles
3. Identify future trends within the marketing communications industry	3.1 Research developments for marketing communication within digital communications technology 3.2 Scope the relative impact of new and alternative technologies on the industry 3.3 Apply information on future trends in everyday activities related to typical work roles
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
Reading	1.1-1.4, 2.1, 3.1, 3.2, 4.1, 4.2	• Gathers, interprets and analyses a variety of textual information from a range of sources to identify relevant and key information
Writing	1.5, 3.2, 3.3, 4.3, 4.4	• Integrates information from a number of sources to create cohesive documents using suitable format and grammatical structure, with clear, logical language suitable to the audience and purpose
Oral Communication	4.3	• Presents information using language appropriate to audience

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Numeracy	3.1, 3.2	• Uses mathematical skills to interpret data and statistical information
Navigate the world of work	2.1, 2.2	• Understands and adheres to legal and regulatory responsibilities related to own work
Interact with others	4.3	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information
Get the work done	1.5, 2.2, 3.3, 4.4	• Applies industry knowledge to work tasks • Uses a continuous learning approach to improve capacity to work effectively and identify and solve problems as they occur, and to address emerging opportunities and issues

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG418 Develop and apply knowledge of marketing communication industry	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 BSBMKG418 Develop and apply knowledge of marketing communication industry

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- Research and report on the marketing communications industry structure, its role in society and within particular organisations
- develop a stakeholder analysis relevant to particular organisations
- scope the impact of new and alternative communication technology on the marketing communications industry
- research and report on the current issues affecting the marketing communications 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 marketing communications industry
- categorise industry structures and networks
- describe organisational and client operating environments, structures, and business and marketing plans
- list the current digital communications technologies, platforms and devices
- 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 marketing communications field of work and include access to:

- relevant legislation and regulations

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- communications equipment and technology
- relevant workplace documentation and resources
- case studies or, where possible, real situations
- industry software packages and apps.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG419 Analyse consumer behaviour

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to analyse consumer behaviour for 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. They conduct a thorough analysis of consumer attitudes and behaviour, and make recommendations on marketing strategies to increase consumption of the product or service being marketed.

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

Unit Sector

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 a 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 a 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 Review relevant data to determine consumer digital footprints, engagement journeys and expectations 2.6 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 Clarify the role of the consumer in the digital marketing environment and model engagement conversations and interventions 3.4 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, 2.1-2.6, 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 purpose and

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		audience
Oral Communication	1.1, 3.2	• Gathers information through active listening and questioning • Presents information using suitable words and non-verbal features
Numeracy	1.2, 1.3, 2.1, 2.3, 2.5	• Uses mathematical skills and techniques to interpret and process data and analyse trends
Navigate the world of work	1.1, 1.3, 2.6, 3.4	• Complies with implicit and explicit organisational procedures and processes • Adheres to ethical, legal and 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, 2.1-2.6, 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

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG419 Analyse consumer behaviour	BSBMKG402 Analyse consumer behaviour for specific markets	Updated to incorporate digital market aspects	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 BSBMKG419 Analyse consumer behaviour

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse consumer behaviours
- model consumer behaviour on alternative digital platforms
- 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
- compare current digital channels relevant to the business and consumer against costs and benefits
- 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 marketing communications field of work and include access to:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies or, where possible, real situations
- industry software packages and apps (where applicable).

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBMKG420 Create digital media user experiences

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to create digital user experience for application within the context of marketing communication.

It applies to individuals working in a variety of marketing communication occupational roles who have responsibility for developing and implementing client solutions within the digital communication space. Individuals may work separately or as part of a multidisciplinary team.

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. Specify intent	1.1 Document objectives for digital engagement 1.2 Specify characteristics of product, brand or organisation 1.3 Identify and work within legislation, regulation and policy frameworks relevant to digital user experiences
2. Classify users and conversation types	2.1 Classify users according to engagement patterns, socio-economic, and digital platform characteristics 2.2 Identify user and conversation types from data analysis of

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ELEMENT	PERFORMANCE CRITERIA
	similar known user experience journeys 2.3 Draw schematics to represent typical conversation types based on device, platform, client and user intent
3. Profile user journeys and interventions	3.1 Identify and document the digital enclaves and engagement patterns of users 3.2 Nominate and classify points of digital contact with client product, brand or organisation 3.3 Model an atypical user journey 3.4 Select location, style and triggers for intervention in the user journey
4. Design engagement opportunities and events	4.1 Develop user stories from multiple perspectives that promote positive engagement 4.2 Design digital and/or analogue events that stimulate user engagement and enhance the experience 4.3 Ensure user interface design meets user, brand, product and organisation style and expectations 4.4 Establish performance indicators for user experiences and engagement
5. Converse, monitor and respond to users	5.1 Facilitate real time interaction with users according to design 5.2 Monitor user engagement using relevant digital tools and techniques 5.3 Respond to users within relevant performance indicator parameters
6. Review and evaluate user experiences	6.1 Collate digital data on user experience journeys 6.2 Moderate data to identify exceptions from expectations 6.3 Document issues and recommendations to improve further user experiences

Foundation Skills

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, 2.1-2.3, 3.1	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Reviews reported information to categorise user groups, build understanding and improve practices
Writing	1.1, 1.2, 2.3, 3.1-3.3, 4.1, 4.2, 6.3	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience • Creates materials to positively engage users
Oral Communication	5.1, 5.3	• Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding
Numeracy	2.2, 2.3, 3.1, 6.1, 6.2	• Evaluates and uses data to create visual representations of the user experience to communicate effectively with a range of audiences
Navigate the world of work	1.3, 4.3, 5.3	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	5.1, 5.3	• Selects and uses appropriate conventions and protocols when communicating and interacting with digital users
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.4, 4.1-4.4, 5.1, 5.2, 6.1-6.3	• Plans, organises and implements own work activities that ensure compliance with organisational policies and procedures, and legislative requirements • Sequences and schedules complex activities, and monitors implementation • Applies understanding of users to create an experience that fulfils expectations, as well as organisational goals • Monitors and evaluates outcomes using digital tools to identify opportunities for improvement

Unit Mapping Information

ode and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG420 Create digital media user experiences	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 BSBMKG420 Create digital media user experiences

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- document objectives and characteristics for digital engagement
- identify and classify digital users and engagement patterns
- create schematic(s) of user journeys
- select mode, type and form of digital interventions in user experience
- write digital user stories
- interpret legislation, regulation and policy as applied to creating user experiences
- interact with digital users ‘on-brand’ in real time
- evaluate digital data to identify performance exceptions.

Note: If a specific volume or frequency 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 types of digital experience based on current technology
- explain how legislation and policy impacts on user experience design
- compare user types, their digital journeys, and common characteristics
- list common events and methods used for intervention in digital journeys
- demonstrate usage of common industry analytics tools applied to user experience data.

Assessment Conditions

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

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- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG421 Optimise digital media impact

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to optimise digital media impact for application within the context of marketing communications.

It applies to individuals working in a variety of marketing communications occupational roles who have responsibility for developing and implementing client solutions within the digital communications space. Individuals may work individually or as part of a multidisciplinary team.

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

Unit Sector

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. Analyse digital media impact	1.1 Determine measurable impact objectives for digital media 1.2 Review and deliver insights from online and offline channel data 1.3 Identify tools and technologies accessed by customers 1.4 Clearly establish audience engagement characteristics, expectations and responses 1.5 Identify gaps in engagement and expectations

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ELEMENT	PERFORMANCE CRITERIA
2. Establish an experimentation framework	2.1 Design, build, and test a learning environment using industry tools and technologies 2.2 Prepare strategies for rapid real-time response, and rapid change 2.3 Model channel interaction options 2.4 Test interaction with target groups 2.5 Learn and adapt rapidly to changing customer expectations and interactions
3. Create optimised digital channels	3.1 Ensure channels are established using current industry tools and technologies 3.2 Enable visibility of the customer journey in digital environments 3.3 Utilise tools and technologies for visualisations, dashboards and reports for a unified view across multiple digital platforms
4. Support channel strategies	4.1 Work effectively with other experts as part of a multi-disciplinary network 4.2 Enable rapid change to process and interventions to match real-time customer requirements
5. Evaluate effectiveness of digital impact	5.1 Collate digital data on customer engagement, conversations and conversions 5.2 Moderate data to identify exceptions from agreed performance 5.3 Document issues and recommendations to improve further digital media optimisation

Foundation Skills

This section describes language, 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, 2.5	• Identifies and interprets textual information to establish current industry and project status from relevant information
Writing	1.2, 1.4, 1.5, 2.1, 2.2, 5.1, 5.3	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience

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Oral Communication	4.1	• Presents information and seeks advice using language appropriate to audience
Numeracy	1.1, 1.2, 1.4, 2.1, 2.2, 2.5, 5.1, 5.2	• Identifies and interprets data from a range of sources • Uses modelling capacity and data analysis to establish and test systems, monitor results and make adjustments
Navigate the world of work	2.5	• Recognises and responds to rapidly changing expectations within digital sphere
Interact with others	1.2, 2.4, 4.1, 4.2	• Selects and uses appropriate conventions and protocols when communicating with internal and external parties to seek or share information • Works positively with those from other disciplines to achieved desired outcomes for organisation and clients
Get the work done	1.1-1.5, 2.1-2.5, 3.1-3.3, 4.1, 4.2, 5.1-5.3	• Plans and organises data categories, tasks and workloads • Uses testing to identify and solve routine and non-routine problems • Sequences and schedules complex activities, monitors implementation, and manages relevant communication • Makes decisions from a range of possibilities; reflecting on outcomes • Uses and manipulates digital technology to create, extend and enhance job role, products and capacity to deliver optimised digital media

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG421 Optimise digital media impact	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 BSBMKG421 Optimise digital media impact

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- establish realistic digital channel performance measures
- analyse digital media data and offline information to determine engagement characteristics of target audience
- identify variation between target and actual performance
- create a digital media learning environment
- model and test alternative methods and techniques to optimise digital impact
- respond rapidly to changing expectations, feedback and technological environment
- utilise tools and technologies to monitor digital activity
- work effectively as a team member in a rapidly changing environment
- use data evaluation methods 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:

- list current industry tools and technologies used in digital media channels
- explain current industry level performance metrics and measures
- compare characteristics of users across alternative digital channels
- identify nodes of integration across multiple digital environments.

Assessment Conditions

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

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- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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

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

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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

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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

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

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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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Links

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

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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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Links

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

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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

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

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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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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

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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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BSBMKG528 Mine data to identify industry directions

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to select data sources and apply analysis tools to identify trends in data that inform industry directions for a product, brand or organisation.

It applies to individuals working in a variety of marketing communications occupational roles who have responsibility for undertaking data mining to support plans and strategy development in an integrated marketing environment.

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 purpose of data mining	1.1 Identify and review relevant client or organisational requirements for data mining 1.2 Confirm potential uses of data mining outcomes and recommendations 1.3 Recognise privacy and other requirements within current legislation, regulation and organisational policy that impact on data mining activities

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ELEMENT	PERFORMANCE CRITERIA
2. Identify data sources	2.1 Identify available data sources from public, client and organisation systems 2.2 Negotiate access rights and intellectual property release for relevant data sources 2.3 Rank and prioritise data sources for validity, reliability and completion rates
3. Apply data mining techniques	3.1 Select appropriate tools and techniques suitable for the type and expected degree of complexity in data analysis 3.2 Classify data according to relevant factors including type, content, relationships, location, demographics and maturity 3.3 Analyse data to identify patterns, clusters and relationships 3.4 Use suitable graphical tools to visualise aggregated data
4. Report and recommend on findings	4.1 Assess results of data mining against requirements in order to draw relevant insights 4.2 Weight insights for reliability and validity 4.3 Report data mining process and outcomes in suitable format to support the organisation's knowledge base 4.4 Document lessons learned during the processes for future 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	1.1-1.3, 2.1, 3.2, 3.3, 4.1	• Identifies and analyses complex texts to determine legislative, regulatory, organisational and client requirements • Reviews a range of texts to comprehend both end purpose and inherent risks of data mining • Reads reported information to rank and analyse outcomes against project goals
Writing	1.2, 2.2, 3.4, 4.1-4.4	• Integrates information from a number of sources to develop materials suitable for purpose and audience

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Oral Communication	2.2, 4.3	• Presents information and seeks input using structure and language appropriate to audience
Numeracy	3.1-3.4, 4.1	• Selects and uses appropriate tools to analyse data effectively • Classifies, analyses and aggregates data effectively, using visualisation methods where appropriate
Navigate the world of work	1.1, 1.3, 4.1	• Recognises and follows legislative requirements and organisational policies and procedures associated with data mining
Interact with others	2.2, 4.3	• Selects and uses appropriate conventions and protocols when communicating with internal stakeholders and external suppliers to reach agreement
Get the work done	2.2, 2.3, 3.1-3.4, 4.1-4.4	• Plans and organises workload and processes to ensure compliance with organisational policies and procedures, and legislative requirements • Systematically analyses information and data by identifying and evaluating patterns against set criteria • Draws insights from reported information, enabling increased understanding within the organisation and opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG528 Mine data to identify industry directions	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 BSBMKG528 Mine data to identify industry directions

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- determine data mining requirements from client and organisational sources
- negotiate intellectual property rights release
- apply current industry tools and techniques to a current customer data set to identify patterns and cluster trends
- prepare graphical representation of data patterns
- make recommendations based on an analysis of data mining results.

Note: If a specific volume or frequency 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 various uses of data mining in the context of marketing communications
- identify privacy and other relevant legislation related to public and private data
- explain the terms 'data validity', 'reliability' and 'completion'
- compare the characteristics of public, client and organisational data sets
- identify and list the uses of current industry tools and techniques used in data mining.

Assessment Conditions

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

- relevant legislation and regulations
- communications equipment and technology

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- relevant workplace documentation and resources
- case studies or, where possible, real situations
- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG529 Manage client account

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to profile, plan, support and improve a client account to meet agreed objectives.

It applies to individuals working in a variety of marketing communications occupational roles who have responsibility for managing a client relationship and assisting the client to achieve strategy outcomes.

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. Profile client accounts	1.1 Identify and confirm client accounts with senior management 1.2 Establish product and brand knowledge and clarify objectives with client 1.3 Undertake analysis of client strengths, weakness and expectations for account performance 1.4 Confirm communication channels with client 1.5 Recognise and incorporate account management requirements

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ELEMENT	PERFORMANCE CRITERIA
	within current legislation, regulation and organisational policy
2.Implement account management plan	2.1 Establish key account performance indicators with client 2.2 Identify account events and campaigns over agreed timeframes 2.3 Prepare account budgets for approval 2.4 Enable adequate resources to meet account management needs 2.5 Prepare briefs of requirements for internal departments, staff and external specialists as required 2.6 Oversee production of events and campaigns to meet client requirements
3. Represent accounts	3.1 Build trust and respect for the client within the organisation and marketplace 3.2 Maintain effective communication channels with client 3.3 Seek regular feedback on performance and adjust as necessary
4. Identify opportunities for improvement	4.1 Undertake account reviews with client and own management 4.2 Identify performance against agreed indicators 4.3 Recommended revisions to account plan to meet client requirements 4.4 Manage client expectations of performance to meet market 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	1.1-1.5, 4.1, 4.2	• Identifies and analyses texts to determine legislative, regulatory and organisational requirements • Recognises and interprets textual information to establish understanding of client, and client's expectations
Writing	1.1-1.4, 2.3, 2.5, 4.1, 4.3	• Researches, plans and prepares documentation using format and language appropriate to context, purpose and audience

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Oral Communications	1.1, 1.2, 1.4, 2.1, 2.3, 3.2, 3.3, 4.1, 4.3	• 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	2.1-2.4, 4.2	• Interprets and uses mathematical skills to set timeframes, budgets and performance indicators, as well as manage resource planning • Evaluates data to monitor progress
Navigate the world of work	1.5, 2.6, 4.2	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Interact with others	1.1, 1.2, 1.4, 2.1, 2.3, 2.5, 3.1-3.3, 4.1, 4.3, 4.4	• Selects and uses appropriate conventions and protocols when communicating with clients and external specialists, as well as internal management, other departments and staff to seek or share information • Maintains regular communication with client, consulting and negotiating positive outcomes on a range of topics
Get the work done	1.5, 2.2-2.6, 4.1, 4.3	• Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirements • Sequences and schedules 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**
BSBMKG529 Manage client account	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 BSBMKG529 Manage client account

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- interpret client instructions to establish key performance requirements
- undertake a SWOT analysis of client's marketing communications
- establish and maintain effective communications with a client
- prepare an account plan and budget over an agreed timescale
- prepare client briefs for production and other works or 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 client products, brand and strategy in the marketplace
- list common industry account management performance indicators
- identify contract law as it applies to account management
- identify industry trends and characteristics relevant to a client's products and brand.

Assessment Conditions

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

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies or, where possible, real situations

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- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBMKG530 Create distributed multiplatform digital advertisements

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to prepare digital advertisements and get them ready for implementation in a demand-side multiplatform environment.

It applies to individuals working in a variety of marketing communications occupational roles who have responsibility for creating, distributing and monitoring performance of digital advertisements.

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 creative brief	1.1 Confirm central idea or creative concept, technique/s for expressing the idea/concept and digital platforms 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 1.4 Specify target audience characteristics, digital markets and

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ELEMENT	PERFORMANCE CRITERIA
	devices relevant to the brief 1.5 Identify legal and ethical constraints
2. Create digital multiplatform advertisements	2.1 Determine and produce copy and design elements to communicate required image, features and benefits of product or service 2.2 Size and position each element of the 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 Design relative size, position and style variations to suit multiple digital platforms and devices 2.5 Ensure sound, animation and graphics do not distract from the content of the advertisement 2.6 Ensure advertisement meets requirements of the advertising brief and legal and ethical requirements
3. Implement advertisements in digital markets	3.1 Identify real-time, demand-side digital advertisement server providers 3.2 Assess providers for capability across the required target audience, markets and devices 3.3 Evaluate and set boundaries for involvement in real-time bidding markets 3.4 Determine budget and time limits for advertisements served 3.5 Authorise digital advertisements in selected distribution environments
4. Monitor and respond to advertising environment	4.1 Monitor reach and response rates from real-time data 4.2 Make required changes to production advertisements and impression metrics in line with rapid change in circumstances

Foundation Skills

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, 2.5, 2.6, 3.1, 3.2	• Identifies and analyses texts to determine legislative, regulatory and organisational requirements • Recognises and interprets textual information to establish job requirements from relevant information • Uses texts to identify and assess competencies of external providers
Writing	2.1-2.4	• Researches, plans and prepares documentation using format and language appropriate to context, purpose and audience • Creates content and design elements that work together, within accepted rules of design, for selected platforms and devices; within the timeframe and according to the brief
Numeracy	3.2-3.4, 4.1, 4.2	• Analyses data to inform decisions on appropriateness, time-effectiveness and cost • Evaluates data to monitor progress
Navigate the world of work	1.5, 2.6, 3.5	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role • Provides authorisations as appropriate for role, within limited environments
Interact with others	3.5	• Selects and uses appropriate conventions and protocols when communicating with external suppliers to seek or share information
Get the work done	2.1-2.6, 3.2-3.5, 4.1, 4.2	• Plans, organises and implements own work activities that ensure compliance with organisational policies and procedures, and legislative requirements • Uses systematic approach to clarify client requirements, then setting goals, gathering relevant information, and identifying and evaluating options against both costs and alternatives to create an effective, but flexible product • Evaluates production and outcomes to identify opportunities for improvement, and make adjustments as appropriate

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG530 Create	Not applicable	New unit	No equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
distributed multiplatform digital advertisements			

Links

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

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Assessment Requirements for BSBMKG530 Create distributed multiplatform digital advertisements

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- produce a multiplatform digital advertisement in accordance with an advertising and creative brief
- incorporate time, schedule and budget requirements
- identify and adhere to relevant ethical and legal constraints
- select and assess capability of demand-side advertisement service providers
- determine target characteristics of recipients for advertisement served
- monitor and adjust advertisements in response to real-time server metrics.

Note: If a specific volume or frequency 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 in the digital space
- identify principles and elements of design in digital advertisements
- list and compare the service provided by alternative providers in the demand-side digital advertisement space
- 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 marketing communications field of work and include access to:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies or, where possible, real situations
- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG534 Design effective digital user experiences

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to design a series of effective digital interactions with individual users from a digital marketing perspective.

It applies to individuals working in a variety of marketing and communications occupational roles. These individuals generally have responsibility for design of user experience, where users are engaging with a product, brand or organisational story on various digital platforms.

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. Set measurable indicators for user experience	1.1 Identify factors that impact on user experience in accordance with organisational strategies 1.2 Research and document user expectations in accordance with organisational policies and procedures 1.3 Create and document key observable and measurable criteria for demonstrating effective user experiences, clarifying with relevant personnel where necessary 1.4 Establish systems and processes to collect data on user

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ELEMENT	PERFORMANCE CRITERIA
	experiences in accordance with organisational policies and procedures, and relevant legislation
2. Design user interaction	2.1 Identify and document features and information critical to effective user interaction and list in order of priority 2.2 Research new and emerging digital technologies and platforms that facilitate user interaction in a way that is relevant to the task 2.3 Select most appropriate digital technology/platform in accordance with organisational policies and procedures and aligned to identified user needs 2.4 Define interaction patterns and establish interface behaviour relevant to the product, brand or organisation for selected technology/platform
3. Design user interfaces	3.1 Assess and evaluate existing user interfaces against design requirements 3.2 Devise and develop site, application maps, and content inventory 3.3 Storyboard user transactions, navigation, access and egress options 3.4 Prepare and review wireframes and mock-ups of user journeys across the relevant technologies and platforms, assessing against organisational strategies and identified user priorities
4.Test user interfaces	4.1 Create an actual, prototype or virtualised test environment 4.2 Model expected user behaviours against specified user stories 4.3 Incorporate real-time user feedback, where available and appropriate 4.4 Revise metrics, interaction and interface designs, in response to testing, in order to better meet identified user requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, analyses and evaluates complex textual information to determine organisational, legislative and regulatory requirements, as well as trends and user expectations

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Writing	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience • Uses graphical representations and mapping to enable holistic visualisations of complex systems
Numeracy	• Establishes data systems and graphical schematics to capture, monitor, measure and test the user experience
Navigate the world of work	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information
Get the work done	• Plans and organises information and complex tasks in a logical sequence, effectively managing workload • Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option • Uses understanding of digital world to create effective, relevant, user experiences

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG534 Design effective digital user experiences	BSBMKG524 Design effective user experiences	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit.

Links

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

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Assessment Requirements for BSBMKG534 Design effective digital user experiences

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- set measurable indications of user experience by identifying and prioritising relevant impacting factors
- prepare data collection systems relevant to user experiences
- research and evaluate digital technologies to implement user experiences and determine the solution that is most aligned to identified user needs
- demonstrate expected user behaviour within a specific application
- use current industry tools to prepare and test a digital user experience application.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of existing and emerging digital technologies and platforms used to engage users
- Key features of common user usage patterns in the digital space
- Key features of consistent and intuitive user experience design
- Key uses of common industry tools to design and test user experiences
- Key features of relevant organisational strategies, policies and procedures
- Key features of relevant 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 in the Business Development – Marketing field of work and include access to:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources, including relevant policies and procedures
- case studies or, where possible, real situations
- industry digital applications and platforms.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG535 Devise a search engine optimisation strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop a strategy to improve a website's position in web search engine organic results.

It applies to individuals working in a variety of marketing and communication occupational roles who have responsibility for implementing and monitoring search engine optimisation (SEO) for a client (either internal or external).

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 web search environment	1.1 Identify and clarify client objectives, expectations and target audience 1.2 Review, evaluate and select search engine platforms/applications that most align to client requirements 1.3 Conduct research to determine search terms that are being used by current and prospective customers to find similar products/brands 1.4 Analyse target audience needs, expectations and usage patterns

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Evaluate costs and likely benefits associated with paid search engine marketing compared with organic search engine optimisation 1.6 Document findings and any discernible trends and present to relevant personnel in accordance with organisational policies and procedures
2. Optimise search engine visibility	2.1 Apply site code to instruct and optimise robots, crawlers and indexing for search effectiveness 2.2 Directly submit website URL to selected search engine, where relevant, to increase visibility 2.3 Design and implement a targeted keyword taxonomy that aligns to target audience behaviour 2.4 Devise and implement strategies to enhance page and application design, tags, links and metadata to attract effective search results 2.5 Regularly create and update unique page content 2.6 Identify appropriate 'white hat' techniques and distinguish these from ‘black hat’ deceptive techniques
4. Monitor and evaluate effectiveness of search engine visibility	4.1 Register and regularly review performance of search engine visibility with a web analytics service 4.2 Track page rank using appropriate technologies in accordance with organisational policies and procedures 4.3 Monitor and identify gaps in search performance against requirements and make adjustments as necessary 4.4 Evaluate, report on web search effectiveness, and deliver to relevant personnel

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Recognises and interprets textual information to establish job requirements from relevant information • Identifies, analyses and evaluates complex textual information to determine legislative and regulatory requirements, trends and outcomes

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Writing	• 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	• Participates in discussions using listening and questioning techniques to elicit the views of others and to clarify or confirm understanding
Numeracy	• Interprets and analyses data from a range of sources • Analyses data to effectively inform decisions on appropriateness and cost • Uses coding to test systems and improve security
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and job requirements relevant to own work
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information
Get the work done	• Plans processes and organises information to manage workload and address issues as they arise • Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing the most appropriate option • Evaluates outcomes of decisions to identify and report on opportunities for improvement • Uses a range of technologies to optimise outcomes and extend possibilities

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBMKG535 Devise a search engine optimisation strategy	BSBMKG525 Design effective web search responses	Updates to title, elements, performance criteria and assessment requirements	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 BSBMKG535 Devise a search engine optimisation strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify client objectives and target audience
- analyse and document search engine behaviour of target audience
- select a search environment to engage the needs of target audience
- optimise a web page to improve targeted organic web search results
- assess web analytics to report on web search effectiveness.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of current web search engine applications/platforms
- Key parameters to consider when targeting web search effectiveness
- Key features of the methods, tools and techniques used in search engine optimisation
- Key features of ‘black hat’ and ‘white hat’ search engine optimisation techniques
- Key features of 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 Business Development – Marketing field of work and include access to:

- industry technology, including digital devices, applications, and digital platforms
- communications equipment and technology

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- relevant workplace documentation and resources – including relevant policies and procedures
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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BSBMKG536 Develop strategies to monetise digital engagement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to monetise digital engagement through focus on customer engagement, content relevance and real-time digital payment systems.

It applies to individuals working in a variety of marketing and communications occupational roles who have responsibility for working with clients (both internal and external) on improving income streams from their digital strategies.

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

Unit Sector

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. Analyse the digital channel to be monetised	1.1 Identify and evaluate the opportunities for paid, owned or earned customer engagement 1.2 Audit prior experience with channel monetary transactions, where applicable 1.3 Identify existing barriers to streamlined transactions for digital users 1.4 Prepare key observable and measurable criterion for successful

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ELEMENT	PERFORMANCE CRITERIA
	channel monetisation, in line with organisational strategies 1.5 Recognise and incorporate financial service requirements within current legislation, regulation and organisational policy
2. Create design interventions	2.1 Assess digital processes for reliability and customer trust 2.2 Define the features and digital applications required to enable transactions 2.3 Specify authentication and security requirements to secure transactions, in accordance with organisational policies and procedures 2.4 Model the digital customer engagement to select points-of-sale and closure in line with organisational strategies
3. Select and implement tools and technologies	3.1 Negotiate with financial institutions to establish effective processing parameters in line with task requirements and organisational strategies 3.2 Evaluate and select payment processing tools and technologies 3.3 Identify and evaluate reliability of systems for the collection and analysis of transaction data 3.4 Ensure tools, technologies and applications are tested and activated within identified performance parameters
4. Monitor and evaluate performance	4.1 Conduct review of performance with a financial analytics service in accordance with organisational strategies 4.2 Track transaction metrics using suitable technologies 4.3 Monitor and identify gaps in performance against requirements and adjust as necessary 4.4 Evaluate and report on monetisation effectiveness to relevant personnel in appropriate format

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and analyses text where meaning may be embedded or implicit; drawing on, and making connections with, prior knowledge and experience

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	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Reviews reported information to evaluate workplace strategies and improvement practices
Writing	• Researches, plans and prepares documentation using format and language appropriate to context and audience, as well as legislative and organisational requirements
Oral Communication	• Presents information and seeks advice using language appropriate to audience and context
Numeracy	• Interprets and analyses data from a range of sources • Analyses data to inform implementation decisions and reviews on appropriateness, effectiveness and cost
Navigate the world of work	• Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with internal stakeholders, external service providers and clients to seek or share information
Get the work done	• Plans, organises and implements work activities 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 and outcomes against agreed criteria • Anticipates problems, taking steps to solve them; and 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**
BSBMKG536 Develop strategies to monetise digital engagement	BSBMKG526 Develop strategies to monetise digital engagement	Updates to elements, performance criteria and assessment conditions	Equivalent unit

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Links

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Assessment Requirements for BSBMKG536 Develop strategies to monetise digital engagement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- analyse a digital engagement channel and identify and evaluate the opportunities to monetise transaction
- devise measurable success criteria for monetised transactions
- design a model of customer engagement showing preferred points-of-sale and closure
- describe how digital authentication and security works to develop customer trust
- evaluate, negotiate and enter into service agreements
- identify, document and present trends and performance information from transaction data.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key differences between paid, owned and earned customer engagement
- Key features of the engagement features of common digital financial transaction systems
- Key features of current payment processing tools and technologies used in digital transactions
- Key features of relevant financial services legislation that impact on digital financial transactions
- Key features of relevant organisational strategies, policies 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 Business Development – Marketing field of work and include access to:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources – including policies and procedures
- case studies or, where possible, real situations
- industry digital applications and platforms (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBMKG537 Develop a social media engagement plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to effectively plan engagement with a preferred target audience on social media.

It applies to individuals working in a variety of marketing and communications occupational roles who have responsibility for developing social media plans and facilitating social engagement on behalf of a business or organisation.

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

Unit Sector

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 preferred target audience	1.1 Identify and review relevant client or organisational requirements for product, brand or organisational engagement in social media 1.2 Identify and specify the characteristics of the target audience 1.3 Research and document online habits of the target audience and deliver to appropriate personnel in accordance with organisational policies and procedures
2. Document expected	2.1 Model the typical journey of the target audience across devices,

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ELEMENT	PERFORMANCE CRITERIA
behaviours of target audience	platforms, sites and applications 2.2 Identify common responses to triggers and interventions on social media platforms and applications 2.3 Conduct market research with users on preferred and avoided behaviours on social media 2.4 Evaluate market research to identify the attention span and retention characteristics of alternative content types and engagement patterns 2.5 Document research results and deliver to appropriate personnel
3. Devise social media engagement strategy	3.1 Select preferred social media platforms and applications to meet organisational/client and audience requirements 3.2 Select content and engagement interventions relevant to the target audience, in line with organisational strategies 3.3 Set measurable metrics for successful performance on social media, in line with organisational strategies 3.4 Optimise the use of positive viral and other self-generating expansion techniques 3.5 Identify any risks in the plan to integrity of brand and message, and trust of target audience
4. Facilitate content delivery	4.1 Develop relevant content and schedule release to maximise attention of the target audience 4.2 Engage with target audience on chosen social media platforms by offering personalised responses to target audience questions, comments and reactions 4.3 Review and apply third party tools to automate the engagement process when possible 4.4 Apply measurable metrics for posts, responses and updates 4.5 Maximise cross-platform, device, site and application engagement for effort using suitable tools and techniques
5. Monitor and evaluate social media engagement	5.1 Develop a plan for regular review of performance using a social analytics service 5.2 Review and identify gaps in performance against requirements and adjust as necessary, in line with organisational plan 5.3 Evaluate and report on social media engagement effectiveness, delivering to relevant personnel

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies and analyses complex texts to determine legislative, regulatory, organisational and client requirements • Reviews a range of texts and reported information to understand the audience of the social media engagement
Writing	• Integrates information from a number of sources to develop materials suitable for purpose and audience
Oral Communication	• Presents information and seeks input using structure and language appropriate to audience • Uses questioning and listening to confirm understanding
Numeracy	• Analyses data from a range of sources to effectively understand audience, and define strategy success
Navigate the world of work	• Adheres to legal and regulatory responsibilities, and job requirements relevant to social media engagement
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with internal stakeholders and external suppliers or users to seek or share information
Get the work done	• Plans and organises workload and processes to ensure compliance with organisational policies and procedures, and legislative requirements • Responds rapidly and shows flexibility by taking advantage of the organic nature of social media where it is advantageous for organisation and client • Draws insights from reported information, enabling increased understanding within the organisation and opportunities for improvement

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG537 Develop a social media engagement plan	BSBMKG527 Plan social media engagement	Update to title, elements, performance criteria and assessment	Equivalent unit

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

Links

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

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Assessment Requirements for BSBMKG537 Develop a social media engagement plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- specify a target audience for social media engagement to meet client or organisational requirements, including by setting measurable metrics for determining success
- research online behaviours and characteristics of target audience and identify typical responses and journeys
- review and select social media platforms and applications to meet requirements
- develop and schedule release of relevant content that aligns to strategy
- ensure social media interactions maintain consistent message to brand and develop trust, automating engagement process where possible
- monitor and react positively to changes in the social media space.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of existing legislation and policy relevant to social media
- Key features of existing social media platforms and their relevance to key industry functions
- Key features of typical response characteristics of users to common social media interventions
- Key features of existing major tools and techniques used to engage users on social media

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- Key features of performance measures commonly used to evaluate social media engagement
- Key features of relevant organisational strategies, 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:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources – including organisational policies and procedures
- case studies or, where possible, real situations
- industry digital platforms and applications (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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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Companion 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to correct typographical error.
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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
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

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		mathematically
Navigate the world of work	1.4, 2.3	• Recognises and follows protocols that must be respected and maintained
Interact with others	1.2, 1.3, 3.1, 3.2	• Uses appropriate communication practices in a range 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 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 Release 2	BSBPMG412 Apply project cost management techniques Release 1	Updated to correct typographical error	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to correct typographical error.
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 or, where possible, real situations.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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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

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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.

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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

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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 2	This version first released with BSB Business Services Training Package Version 1.2. Version created to correct missing element
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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
3. Implement project quality improvements	3.1 Review processes and implement agreed changes continually throughout the project life cycle to ensure continuous quality improvement 3.2 Review project outcomes against performance requirements to determine the effectiveness of quality-management processes and procedures 3.3 Identify and document lessons learned and recommended improvements

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.2, 3.1-3.3	• 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, 3.3	• Develops and documents quality requirements for project plan

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		• 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
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, 3.1-3.3	• 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 Release 2	BSBPMG513 Manage project quality Release 1	Updated to correct missing element	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 BSBPMG513 Manage project quality

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.2. Version created to correct missing elements
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.

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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:

- project documentation including quality criteria, evidence of quality monitoring and improvement practices
- case studies or, where possible, real situations
- Interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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

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

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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 2	This version first released with BSB Business Services Training Package Version 1.2. Version created to correct missing elements
Release 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	2.1 Obtain information from suppliers capable of fulfilling

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ELEMENT	PERFORMANCE CRITERIA
procurement processes	procurement requirements 2.2 Determine or adopt established selection processes and selection criteria, and communicate to vendors to ensure transparency 2.3 Obtain relevant approvals for procurement processes to be used
3. Conduct procurement activities	3.1. Identify and act according to ***probity and project governance constraints*** 3.2. Communicate agreed proposals and/or specifications to prospective vendors to ensure clarity of understanding of project objectives 3.3. Solicit vendor responses according to proposal requirements 3.4. Evaluate responses and select preferred vendors according to current legal requirements and agreed selection criteria 3.5. Negotiate with preferred contractor or supplier, to agree on terms and conditions of supply
4. Implement and monitor procurement	4.1. Implement established procurement management plan and make ***modifications*** in line with agreed delegations 4.2. Review progress and manage agreed variations to ensure timely completion of tasks and resolution of conflict within the legal framework of the supply agreement 4.3. Identify and report procurement management issues and implement agreed remedial actions to ensure project objectives are met
5. Manage procurement finalisation procedures	5.1. Conduct finalisation activities to ensure vendor deliverables meet contracted requirements 5.2. Review project outcomes using available procurement records and information to determine effectiveness of procurement processes and procedures 5.3. Document lessons learned 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.

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Skill	Performance Criteria	Description
Reading	1.1, 2.1, 3.1, 3.4, 4.1, 5.2	• Interprets, evaluates and critiques ideas and information from a range of complex texts
Writing	1.2, 2.2, 2.3, 3.2, 3.4, 4.1, 4.2, 4.3, 5.2, 5.3	• Develops plans using vocabulary, structure and conventions appropriate to text • Creates documents for internal and external use, using vocabulary and structure suitable for audience and context • Drafts requests for approvals using organisational formats
Oral Communication	1.1, 2.1, 2.2, 2.3, 3.2, 3.5, 4.2	• 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, 4.2	• Recognises cost parameters and interprets numerical information accordingly • Calculates changes to timelines resulting from changes to plan
Navigate the world of work	1.2, 3.1, 3.4, 4.1	• Understands responsibilities and boundaries of own role
Interact with others	1.1, 2.1, 2.2, 2.3, 3.2, 3.3, 3.5, 4.2	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information • Uses interpersonal skills to negotiate acceptable outcomes
Get the work done	1.1,1.2, 2.1, 3.1, 3.3, 3.4, 4.1, 4.2, 4.3, 5.1, 5.2	• Plans and organises complex activities, monitors implementation and manages relevant communication • Resolves problems and makes decisions based on analysis of options against set criteria and targets

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG518 Manage project	BSBPMG518 Manage project	Updated to correct missing	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
procurement Release 2	procurement Release 1	elements	

Links

Companion Volume implementation guides 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 2	This version first released with BSB Business Services Training Package Version 1.2. Version created to correct missing elements
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 and produce a procurement management plan for a project
- carry out procurement and contracting activities according to agreed processes
- monitor activities across a project's life cycle and resolve issues that could affect achievement of project objectives
- create and maintain procurement records and documentation according to requirements of project and organisation
- document a review of procurement management processes and procedures.

Note: If a specific volume or frequency 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 features of a procurement management plan
- summarise procurement procedures and required documentation
- identify criteria that could be used to select vendors or suppliers
- explain the general conditions and legal obligations of contracts as they relate to project procurement
- explain probity and project governance constraints that relate to project procurement in a project and industry context.

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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 relevant to procurement and contracts
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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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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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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BSBPMG621 Facilitate stakeholder engagement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to 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, program outcomes, and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or working as a consultant.

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

Unit Sector

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 as they apply to the given program of work 1.2 Engage with pertinent stakeholders and agree on communication approaches in accordance with organisational policies and procedures 1.3 Communicate information as planned and address identified variances 1.4 Monitor communication interfaces among constituent projects, aligning to relevant program objectives
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, in accordance with organisational policies and procedures 2.3 Accommodate differing stakeholder interests and expectations, escalating where necessary 2.4 Share evolving stakeholder interests and expectations across the program
3. Assess effectiveness of stakeholder engagement	3.1 Conduct analysis of interactions with pertinent stakeholders and document outcomes to reach desired outcomes 3.2 Assess effectiveness of stakeholder interaction in line with program objectives and organisational policies and procedures 3.3 Develop plan for future stakeholder engagement based on findings of analysis conducted

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Organises, evaluates and critiques ideas and information from complex texts
Writing	• Develops a range of project related documents using appropriate format, vocabulary and structure

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Oral Communication	• 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	• 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
Get the work done	• 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**
BSBPMG621 Facilitate stakeholder engagement	BSBPMG611 Facilitate stakeholder engagement	Updates to elements, performance criteria and assessment requirements	Equivalent

Links

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

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Assessment Requirements for BSBPMG621 Facilitate stakeholder engagement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- apply analytical skills to identify and interpret stakeholder interests and expectations in the context of a program of work
- incorporate inclusive integration skills
- apply workplace communication skills to work with stakeholders effectively
- provide workplace based examples of internal and external stakeholder communications, both formal and informal
- use different communication approaches in different stakeholder contexts
- conduct and document an introspective assessment of stakeholder effectiveness and develop a plan for future stakeholder interactions.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of engagement models, benefits and applications
- Key forms and methods of stakeholder engagement
- Key features of several means, media and methods of communication
- Key features of various types and roles of program stakeholders
- Key features of relevant organisation policies and procedures
- Key program and organisational 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 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.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPMG622 Implement program governance

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to establish and 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 for programs.

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 and accountability	1.1 Negotiate and communicate clear roles and responsibilities within the program and make available to all relevant stakeholders 1.2 Confirm and agree decision making roles with stakeholders 1.3 Document decisions and accountabilities 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 Establish suitable systems and processes to meet program objectives 2.2 Implement effective management control systems to monitor program progress against organisational objectives 2.3 Generate audit documentation, presenting information and distributing reports to all pertinent stakeholders 2.4 Establish and monitor 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 and securely maintain audit records in accordance with relevant legislation 3.3 Report on compliance within regular intervals to relevant authorities and pertinent stakeholders 3.4 Identify and implement actions to rectify non-compliant behaviours, processes and products
4. Enable program support services	4.1 Identify management and internal personnel support needs for the program 4.2 Evaluate and establish appropriate systems to support management and personnel with implementation 4.2 Establish skill development support systems for program personnel to meet program needs 4.3 Implement program support protocols within an organisation in accordance with organisational policies

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies and interprets information from a range of sources
Writing	• Prepares and modifies agreements and plans using appropriate language and format
Oral Communication	• Participates in verbal exchanges using language and features appropriate to the audience • Uses active listening and questioning techniques to confirm understanding
Interact with others	• Uses interpersonal skills to negotiate agreements with diverse stakeholders • Invests time and energy in building and maintaining effective working relationships
Get the work done	• Plans, implements and monitors systems and activities required to implement program governance • Analyses and evaluates options to make decisions about possible governance issues • Evaluates outcomes to identify improvement opportunities

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPMG622 Implement program governance	BSBPMG612 Implement program governance	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBPMG622 Implement program governance

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- document program role and responsibilities
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key techniques for the use and purpose of program controls
- Key functions of audit and/or compliance requirements for a program
- Key plans to rectify program compliance problems
- Decision making processes in the program context
- Skill development support within 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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- case studies and, where possible, real situations in the workplace
- feedback from stakeholders, which reflects how program governance was implemented for a program.

Links

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

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BSBPMG623 Manage benefits

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to manage 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 Evaluate benefits and their alignment to organisational objectives 1.2 Define and communicate expected short- and long-term benefits and trade-offs with pertinent stakeholders 1.3 Assess qualitative and quantitative data continuously captured to determine project and program performance against respective plans 1.4 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the expected benefits
2. Execute to deliver expected benefits	2.1 Define and agree benefits dependencies with pertinent stakeholders 2.2 Devise and agree benefits delivery approach with pertinent stakeholders considering impact of the benefit into risk management, issues management, and change control 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. Sustain and 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 Evaluate and communicate benefits against forecast projects delivery plan 3.4 Assess and record lessons learned throughout projects and communicate to pertinent stakeholders 3.5 Address variances in delivery of expected benefits

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Applies appropriate strategies to construct meaning from complex texts
Writing	• Prepares documentation to confirm and report on defined benefits

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	and reviews using appropriate format, vocabulary and structure
Oral Communication	• Participates in a range of verbal exchanges using language and features appropriate to audience • Uses active listening and questioning techniques to confirm understanding
Numeracy	• Calculates, compares and contrasts outcomes against targets using appropriate mathematical formulae
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with relevant stakeholders to share information
Get the work done	• 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**
BSBPMG623 Manage benefits	BSBPMG613 Manage benefits	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBPMG623 Manage benefits

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- apply analytical skills to identify and articulate program benefits
- apply knowledge of organisational strategies to ensure alignment of 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key components of different benefit delivery models
- Key techniques used in decision making theory and analysis applied to benefits assessment
- Types and definition of program benefits
- Workplace identification and documentation of program benefits
- Relationship between program delivery and benefits realisation approaches
- Forecasting program benefits realisation.

Assessment Conditions

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 examples of program workplace documentation related to attaining program benefits
- feedback from stakeholders, which reflects how benefits management was managed for a program
- case studies and, where possible, real situations in the workplace.

Links

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

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BSBPMG624 Engage in collaborative alliances

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to enable a program manager 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, program outcomes, and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or as a consultant.

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

Unit Sector

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. Identify opportunities for collaboration and develop collaborative alliances	1.1 Identify and evaluate opportunities for collaborative alliances according to organisational and program objectives 1.2 Identify and evaluate potential collaborators in line with relevant organisational policies 1.3 Initiate and develop relationships with potential collaborators according to relevant organisational policies and procedures
2. Establish collaborative agreements	2.1 Initiate, negotiate, agree and document a collaborative approach with parties which adhere to organisational policies and relevant legal requirements 2.2 Approve and regularly review each formal agreement to ensure continuation of envisaged value and potential need for changes and additions, in accordance with relevant organisational policies and procedures 2.3 Develop collaboration plans for each agreement to support implementation
3. Support the evolution of collaborative agreements	3.1 Monitor and nurture relationships with collaborators to sustain commitment 3.2 Assess performance of all parties to an agreement against organisational and program objectives and expected results, and address variances 3.3 Make changes to agreements as required in accordance with organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies and interprets information from a range of sources
Writing	• Prepares and modifies agreements and plans using appropriate language and format

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Oral Communication	• Participates in verbal exchanges using language and features appropriate to the audience • Uses active listening and questioning techniques to confirm understanding
Interact with others	• Uses interpersonal skills to negotiate agreements with diverse stakeholders • Invests time and energy in building and maintaining effective working relationships
Get the work done	• 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**
BSBPMG624 Engage in collaborative alliances	BSBPMG614 Engage in collaborative alliances	Updates to elements, performance criteria and assessment requirements	Equivalent

Links

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

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Assessment Requirements for BSBPMG624 Engage in collaborative alliances

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- adopt appropriate communication and networking skills to assist in engaging potential collaborators
- employ environment scanning techniques to identify opportunities for collaboration that are aligned to desired program outcomes
- conduct negotiations to devise and agree collaboration arrangements
- conduct review of formal agreements
- conduct assessment of effectiveness of collaborative relationships.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of methods to maintain and sustain alliances
- Key features of several negotiating strategies
- Discuss summary profiles of collaborators
- Key features of several types and forms of collaboration agreements
- Key features of relevant organisational policies and procedures
- Key program and organisational 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 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.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=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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BSBPRC401 Plan procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to identify suppliers, determine procurement methods, establish a plan and prepare for procurement activities.

It applies to individuals who are required to plan for complex procurement activities through the identification of materials and services to support organisation strategies.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish goods and services to be procured	1.1 Determine and agree organisation need for goods and/ or services to be procured 1.2 Obtain specifications for goods and services to be procured from relevant personnel and clarify as required 1.3 Research and identify supply market for goods and/ or services to be procured 1.4 Select procurement methods most appropriate to particular goods and services to be procured

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Communicate with stakeholders to approve goods and/ or services to be procured
2. Evaluate specifications of procurement	2.1 Assess the scope and function of goods and/or services to be procured, identifying outcomes, objectives and logistics 2.2 Establish procurement timeframe and develop a schedule for tender of goods and/ or services 2.3 Create measurable outputs for desired contractual outcomes 2.4 Specify resource requirements and stakeholders responsible for key procurement activities
3. Identify suppliers	3.1 Conduct market analysis to identify suppliers 3.2 Develop request for quotation documentation and invite suppliers to bid 3.3 Review suppliers against procurement requirements and organisational protocols 3.4 Make recommendations about preferred offers, seek and obtain approval from relevant personnel
4. Manage procurement plan	4.1 Establish a strategy for managing the outputs from the supplier 4.2 Develop key performance indicators to monitor performance and ensure outcomes are achieved 4.3 Create a management strategy for transition in/out issues 4.4 Consult with stakeholders to confirm procurement plan 4.5 Consult with stakeholders through all stages of the development of the procurement plan

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Analyses and interprets information to identify relevant key information
Writing	• Creates everyday workplace documentation using terminology and format relevant to audience and

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	purpose
Oral Communication	• Uses suitable language to liaise with suppliers and clarify information within the organisation • Uses active questioning and listening techniques to confirm requirements
Numeracy	• Performs mathematical analysis to evaluate supplier bids
Navigate the world of work	• Follows organisational procedures and policies • Understands how own role connects with others and contributes to broader work goals
Get the work done	• Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes • Implements standard procedures to make routine decisions • Uses the main features and functions of digital tools to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC401 Plan procurement Release 1	BSBPUR401 Plan purchasing Release 1	Title change, updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBPRC401 Plan procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- establish goods and/ or services to be procured and prepare request for quotation
- create procurement methods and verify with stakeholders
- assess the scope of the procurement and create a schedule
- determine desired organisational outcomes from procurement activity
- evaluate resource requirements for all procurement activities
- analyse market for goods and/ or services to be procured
- identify and issue invitation for suppliers to offer
- prepare offers and obtain offer approval from stakeholders
- develop strategies to manage supplier transition and performance
- consult with stakeholders throughout the duration of procurement planning activities.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key principles and practices of planning procurement activities for goods and/or services
- key features of organisational policies and procedures relating to planning procurement for goods and/ or services, including:
  - organisational policy and procedures for preparing and evaluating supplier offers
  - organisational stakeholder buy-in and continual consultation for procurement activities
  - alignment to organisational strategic goals

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- safety procedures for specific procurement activities
- key features of routine procurement plans.
-

Assessment Conditions

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

- organisation policies and procedure
- procurement strategies and relevant procurement records
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC402 Negotiate contracts

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to participate in the negotiation of contracts to procure goods and/or services.

It applies to individuals who undertake activities such as cost and market analysis, using information to support the planning of negotiations with suppliers to achieve best value. Individuals are required to plan, prepare and undertake effective contract negotiations while demonstrating high levels of personal effectiveness.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare for contract negotiation with suppliers	1.1 Prepare for contract negotiation and research supplier organisation information, regulatory constraints and unique category considerations 1.2 Undertake market analysis to support contract negotiations and inform negotiation strategy 1.3 Seek legal advice on implications for procurement of goods and/ or services that may impact contract negotiations 1.4 Identify risks associated with contract negotiations

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ELEMENT	PERFORMANCE CRITERIA
2. Establish negotiation processes	2.1 Determine the objectives and establish strategies for contract negotiation meeting 2.2 Establish resourcing requirements with organisation stakeholders 2.3 Access legal expertise to determine the legal requirements for the organisation and ensure they are compliant 2.4 Recognise the use and the content of contractual terms for procured goods and/ or services
3. Undertake contract negotiation	3.1 Establish the bargaining position with stakeholders to determine strength and weaknesses of organisational procurement capability 3.2 Define and evaluate the attributes of a good negotiator and apply them to effective negotiations 3.3 Employ a range of persuasive techniques and tactics to navigate difficult circumstances and achieve desired contract outcome 3.4 Use verbal and non-verbal communications in negotiation situations including reducing the potential for conflict
4. Finalise contracts	3.1 Ensure contracts are signed and exchanged between the organisation and suppliers 3.2 Develop and discuss the legalities and commercial considerations linked to the contract in accordance with organisational requirements 3.3 Ensure contracts and related documents are stored and safeguarded 3.4 Advise relevant stakeholders of contract requirements 3.5 Advise unsuccessful suppliers of non-acceptance of offers

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets and analyses textual information from a range of sources and identifies relevant key information to assist in the negotiation process

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Writing	• Develops material to convey explicit information and results using clear and detailed language appropriate to audience and context
Oral Communication	• Uses clear language and suitable features to provide information to a variety of individuals • Uses active listening and questioning techniques to convey and clarify information
Navigate the world of work	• 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	• 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	• Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes • Implements standard procedures to make routine decisions • Recognises and takes responsibility for addressing predictable problems in familiar work contexts • Understands the importance of secure information in relation to own work

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC402 Negotiate contracts Release 1	BSBPUR402 Negotiate contracts Release 1	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBPRC402 Negotiate contracts

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- prepare and conduct contract negotiations for the procurement of goods and/or services in accordance with organisational policies and procedures, including:
- using market analysis to evaluate suppliers
- determining objectives for contract negotiation
- arranging contract documentation and ensuring compliance
- using a range of effective and persuasive negotiation techniques
- demonstrating personal effectiveness in contract negotiation processes.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation, codes of practice and national standards that affect procurement of goods and/or services
- key principles of procurement contracts, including:
- organisational policies, procedures and relevant documentation for contract negotiation
- key legal requirements for the acquisition of goods and/ or services
- organisation practices, policies and procedures for procurement
- procurement principles for:
  - accountability
  - probity and transparency
  - risk management
  - value for money.

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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 – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- sample contracts
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC403 Conduct international procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to conduct international procurement. This includes sourcing potential suppliers, inviting offers, evaluating the offers received, preparing recommendations and contracting the successful supplier. It also covers arranging importation of the goods, satisfying regulatory requirements, arranging required payments and ensuring all contractual obligations are met.

It applies to individuals who conduct international procurement activities to reduce cost and increase efficiency. Individuals will be able to demonstrate the ability to localise and implement sourcing strategies based on market analysis, business requirements, and organisational objectives. Individuals undertaking this unit are typically undertaking procurement in accordance with an organisation's international procurement guidelines and work under minimal supervision of a senior procurement manager or in consultation with senior management.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 and/ or services to be procured internationally 1.2 Research potential sources of supply from relevant information

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ELEMENT	PERFORMANCE CRITERIA
	sources 1.3 Examine market structures for proposed international procurement activities 1.4 Determine regulations governing international procurement 1.5 Source and apply relevant organisation procedures, policies and regulations govern the international procurement of goods and/ or services
2. Prepare invitations to offer for imported goods	2.1 Obtain and clarify specifications of requirements for international sourcing of specified goods and/ or services from relevant stakeholders as required 2.2 Select procurement strategy most appropriate to the proposed goods and/ or services 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 and/ or services 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 and assess offer documents from suppliers against criteria and requirements of organisational procurement strategies 3.2 Seek further information from suppliers, as required, to clarify offers 3.3 Select preferred offer and make recommendation for approval to relevant personnel 3.4 Consult with stakeholders and obtain approval for recommended offers
4. Action successful offers	4.1 Prepare contract documentation with successful supplier 4.2 Consult to ensure legality of contract agreements in accordance with organisation procedures 4.3 Issue contract in accordance with received approval from stakeholders 4.4 Inform unsuccessful offers of outcome of evaluation process in accordance with legal and organisation requirements
5. Arrange importation of	5.1 Assess risks in ownership and logistics of goods and/ or

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ELEMENT	PERFORMANCE CRITERIA
goods	services throughout international procurement activity 5.2 Seek agents as required to arrange inspection, packing, transport, importation, customs clearance and delivery of goods and/ or services 5.3 Satisfy statutory and regulatory requirements including fumigation and export/import controls 5.4 Ensure supply and logistics channels are managed, to achieve delivery of goods and/ or services satisfactorily and within designated timelines
6. Arrange provision of foreign currency payments	6.1 Obtain advice from stakeholders on payment strategy to be followed for international procurement 6.2 Receive arrangements made to initiate currency hedging, letter of credit or payment by direct cheque in accordance with advice 6.3 Finalise and authorise payments at appropriate times according to organisational requirements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Gathers and analyses textual information from a range of sources and identifies relevant key information for work requirements
Writing	• Develops clear workplace documents appropriate to audience and context • Completes authorisations according to organisational procurement requirements
Oral Communication	• Uses clear language and appropriate features to provide information to a variety of stakeholders and personnel • Uses active listening and questioning techniques to convey and clarify information
Numeracy	• Interprets numerical data to determine procurement, insurance and foreign currency requirements
Navigate the world of work	• 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

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Interact with others	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	• Takes responsibility for systematically planning, sequencing and prioritising tasks according to agreed timelines • Uses systematic processes to gather and analyse information required to make decisions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC403 Conduct international procurement Release 1	BSBPUR403 Conduct international purchasing Release 1	Title change, updates to performance criteria, performance evidence, knowledge evidence and assessment requirements.	Equivalent unit.

Links

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

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Assessment Requirements for BSBPRC403 Conduct international procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- apply market research techniques to source international suppliers for specified goods
- prepare and issue invitations to suppliers to procure goods and/ or services
- evaluate and process documentation to select successful supplier offers
- consult and obtain approval from stakeholders on preferred supplier
- prepare documentation and issue contracts with preferred suppliers
- inform unsuccessful suppliers of outcome of evaluation process
- arrange importation of goods and foreign currency payments
- evaluate risks and verify regulatory requirements of goods and/ or services to be procured internationally
- check that contractual conditions have been met, and take action if non-compliances are identified
- apply relevant legislation, regulations, codes of practice, standards and organisation policies and procedures
- undertake risk analysis activities related to international procurement
- apply principles of payments using foreign currency.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key principles and provisions of relevant legislation that affects business operations, codes of practice and national standards relevant to procurement
- range of industry accepted methods of payment applicable to international procurement

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- standard organisational policies and procedures for international procurement
- risk factors and control measures relevant to international procurement
- Key range of agencies and organisations involved in arranging importation arrangements such as:
  - consultants
  - customs brokers
  - freight forwarders
  - logistics and transport companies
- key features of organisational policy to identify relevant insurance brokers and outline the range of available types of policies to cover risks of international procurement.

Assessment Conditions

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

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC406 Conduct e-procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to conduct e-procurement to source goods and/ or services in response to internal needs.

It applies to individuals who conduct online procurement of goods and/ or services from a variety of sources. While an individual may work closely with other staff members in the organisation, they have responsibility and autonomy to source quality goods and/ or services, monitor the procurement process and assess suppliers against organisation procurement policies and procedures.

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

Unit Sector

Administration - Procurement

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify requirements and risks for e-procurement	1.1 Research and identify goods and/ or services to be e-procured in accordance with organisational objectives 1.2 Assess risk and benefits associated with e-procurement of goods and/ or services in accordance with organisational policies and procedures 1.3 Document and discuss e-procurement risks and benefits with

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ELEMENT	PERFORMANCE CRITERIA
	organisational management
2. Engage in e-procurement	2.1 Create an e-procurement order for goods and/ or services 2.2 Electronically monitor the status of e-procured goods and/ or services against costs, timelines and organisational policies and procedures 2.3 Assist in the e-payment of third parties and identify rejected payments 2.4 Contribute to the development of e-procurement reports 2.5 Present report to organisational management for review
3. Support organisational objectives through e-procurement	3.1 Analyse the benefits of e-procurement against organisational objectives and identify areas for improvement 3.2 Review different e-procurement platforms that could assist in continuous improvement of organisational policies and procedures 3.3 Contribute to new ways of electronic working through improvements in e-procurement 3.4 Assist in consultation of stakeholders to gain buy-in to e-procurement strategies

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Analyses, matches and interprets information, paying attention to detail to identify errors
Writing	• Records information accurately using correct spelling, grammar and terminology
Oral Communication	• Uses questioning and active listening to convey and clarify information and instructions
Numeracy	• Performs mathematical analysis to verify financial information
Navigate the world of work	• Follows legislative requirements, and organisational protocols, policy and procedures relevant to own role
Interact with others	• Uses correct communication practices and protocols to obtain strategy approval from stakeholders

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Get the work done	• Plans, organises and implements tasks according to organisational and requirements • Responds to problems by implementing standard or logical solutions

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC406 Conduct e-procurement Release 1	Not applicable	New unit	No equivalent unit

Links

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

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Assessment Requirements for BSBPRC406 Conduct e-procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- contribute to e-procurement processes in an organisation, including:
  - researching and documenting e-procurement risks
  - monitoring e-procurement status electronically
  - assist in monitoring of timelines and costs
- evaluate and implement improvements to e-procurement strategies in an organisation.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of researching and identifying goods and/ or services to be e-procured
- assessment of key risks impacting e-procurement
- criteria and processes for assessing risk for e-procurement
- key requirements of electronic applications relating to e-procurement
- relevant legislation and organisation policies and procedures related to:
  - e-procurement terms and conditions for procurement
  - online transactions
  - continuous improvement.

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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 – procurement and contracting field of work and include access to:

- relevant legislation and organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC501 Manage procurement strategies

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop, implement and evaluate an organisation's procurement strategies.

It applies to individuals focussing on the development, design and implementation of strategies to support the procurement of goods and/ or services. While an individual may work closely with other staff members in the organisation, they have individual responsibility and autonomy to develop, communicate and implement organisational procurement strategies.

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

Unit Sector

Administration – Purchasing and Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine procurement objectives	1.1 Evaluate procurement strategies within organisation 1.2 Identify key strategic business units and their alignment to organisation objectives for procurement 1.3 Establish models for strategy development within organisation for procurement 1.4 Assess the relationship between procurement and strategic

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ELEMENT	PERFORMANCE CRITERIA
	organisation objectives 1.5 Undertake consultations with relevant stakeholders and personnel to seek input into procurement strategies
2. Develop procurement strategies	2.1 Analyse and develop procurement strategies, taking into account legal requirements and organisation policies 2.2 Develop resourcing, financial and other plans to support implementation of procurement strategies 2.3 Assess the impact of procurement strategies on broader organisation objectives 2.4 Consult with stakeholders to confirm procurement strategy and its alignment to organisational objectives
3. Implement procurement strategies	3.1 Determine resourcing requirements to implement procurement strategy 3.2 Assist in implementation of procurement strategies 3.3 Monitor activities associated with the implementation of procurement strategies 3.4 Identify and address risks arising during the implementation of procurement strategies 3.5 Manage performance reporting frameworks to understand efficiency and effectiveness of procurement strategy
4. Evaluate procurement strategies and implement improvements	4.1 Review implementation of procurement strategies to assess areas for improvement 4.2 Identify improvements to procurement strategies from review process 4.3 Gain approval from stakeholders to implement improvements to procurement strategies 4.4 Monitor and review implementation of improvements to determine their effectiveness

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description

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Reading	• Interprets textual information from a range of sources and determines how content may be applied to organisational requirements
Writing	• Develops complex material to convey explicit information and results using clear and detailed language appropriate to relevant audience and context
Oral Communication	• 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	• Interprets a range of numerical data to determine procurement objectives
Navigate the world of work	• Appreciates the implications of organisational, legal and regulatory responsibilities that relate to own work
Interact with others	• Liaises with suppliers and relevant stakeholders to negotiate agreement on procurement strategies • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	• Accepts responsibility for planning, prioritising and sequencing complex tasks and workload • Uses analytical processes to generate and evaluate possible solutions to problems • Reflects on outcomes to identify possible improvements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC501 Manage procurement strategies Release 1	BSBPUR501 Develop, implement and review purchasing strategies Release 2	Title change, updates to elements and performance criteria, performance and knowledge evidence	Equivalent unit

Links

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

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Assessment Requirements for BSBPRC501 Manage procurement strategies

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- undertake research and analysis of organisation objectives and policies
- develop procurement objectives and strategies for an organisation, including:
  - performance management frameworks
- implement procurement strategies developed in an organisation
- evaluate and implement improvements to procurement strategies in an organisation.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation that affect procurement and contracting
- key organisational business units
- key industry models for development of procurement strategy
- key components of organisational policies and procedures related to:
  - business terms and conditions for procurement
  - contracting and tendering
  - ethical behaviour
  - `procurement processes.`

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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 – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC502 Manage supplier relationships

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to manage relationships with suppliers of larger or multiple smaller procurement activities, where the relationship is of some significance to the organisation. It covers managing procurement agreements, resolving disagreements with suppliers, finalising agreements, and reviewing the performance of suppliers.

It applies to individuals who manage relationships with an organisation's suppliers, and is typically undertaken by a senior procurement officer or procurement manager.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Manage supplier agreements	1.1 Monitor supplier performance throughout the duration of agreements in accordance with organisational policies and procedures 1.2 Identify, monitor and manage risks in risk management plans throughout the duration of agreements

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify and address potential and actual performance issues 1.4 Negotiate and resolve amendments to agreements as a consequence of addressing performance issues 1.5 Seek and obtain approval for amendments from organisational management 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 Establish transparent and trust with supplier to support relationship 2.3 Document amendments to agreements as a consequence of the resolution of disagreements in accordance with organisational policies and procedures 2.4 Seek and obtain approval for amendments from organisational management 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 procurement agreements on completion of contract 3.3 Document arrangements to finalise agreements in accordance to organisational policies and procedures
4. Review performance of suppliers	4.1 Evaluate supplier performance against the requirements of procurement 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

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Skill	Description
Reading	• Interprets textual information from a range of sources and determines how content may be applied to organisational requirements
Writing	• Documents amendments to agreements • Develops documentation according to organisational formats
Oral Communication	• 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	• Interprets financial information within procurement agreements
Navigate the world of work	• Understands legal and organisational obligations that underpin agreements and contracts with suppliers
Interact with others	• 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	• Plans and implements tasks required to manage agreements, including negotiating and coordinating input from others • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, and seeking input and advice from others • Uses systematic, analytical processes to identify and solve performance problems

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPRC502 Manage supplier relationships Release 1	BSBPUR502 Manage supplier relationships Release 1	Updates to elements and performance criteria, performance evidence and knowledge evidence.	Equivalent unit

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Links

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Assessment Requirements for BSBPRC502 Manage supplier relationships

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- successfully manage relationships with suppliers over the life of specific procurement agreements in accordance with organisational policies and procedures, including:
  - using effective communication to resolve disputes with suppliers amending and developing documentation to finalise an agreement with a supplier
  - evaluate supplier performance and formulate recommendations about future use of supplier.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of procurement supplier relationship management
- methodologies to monitor, review and evaluate supplier performance
- key techniques to successfully manage and resolve supplier disagreements
- key features to outline organisation’s policies and procedures related to:
  - conduct and ethics
  - procurement
  - tendering and contracting.
  -

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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 – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement supplier management records
- office equipment and supplies
- case studies and, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC503 Manage international procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to manage international procurement of specific goods and/ or services within organisational policies and procedures, and regulatory frameworks.

It applies to individuals who are responsible for managing international procurement activities in an organisation. They develop and implement relevant supply chain management strategies, manage and review the implementation of improvements to international procurement strategies. They will be responsible for implementing management techniques to help them involve others, be innovative, consultative, influential and persuasive in order to achieve targets effectively.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop and document strategies for international procurement	1.1 Research and analyse strategic implications for the organisation's international procurement of goods and/ or services 1.2 Research international market structures and determine the

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ELEMENT	PERFORMANCE CRITERIA
	benefits of global sourcing 1.3 Research and analyse export regulatory requirements of goods and/ or services to be procured internationally 1.4 Draft and submit for approval the organisation's strategies for international procurement
2. Implement international procurement strategies	2.1 Communicate international procurement strategies to relevant personnel and stakeholders 2.2 Provide support to stakeholders to implement international procurement strategies 2.3 Monitor implementation of international procurement strategies within the organisation 2.4 Identify and address problems and issues arising from implementation of international procurement strategies
3. Monitor international procurement activities	3.1 Evaluate cultural considerations potentially impacting international procurement activities 3.2 Research and assess the legal requirements on internationally procured goods and/ or services and their alignment with organisational strategies 3.3 Assess STEEPLE (social, technical, economic, environmental, legislative and ethical) factors and their impact and risks on international procurement activities 3.4 Evaluate suppliers and potential exception clauses 3.5 Clarify and resolve any discrepancies to the satisfaction of all parties 3.6 Prepare draft contract documentation and access legal expertise to check legality of contract agreement
4. Determine payment strategies	4.1 Analyse financial risk and implement available controls in accordance with organisational policies and procedures 4.2 Identify source and availability of funds for payment that cover goods and/ or services 4.3 Research and analyse currency payment methods and implication on acquisition of goods and/ or services 4.4 Select currency payment methods 4.5 Finalise processing of payment and confirm funds release with organisational management
5. Determine logistics	5.1 Determine requirements for pre-shipment inspection and

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ELEMENT	PERFORMANCE CRITERIA
strategies	arrange inspection 5.2 Research and analyse shipping facilities and other transport risks 5.3 Research and analyse regulatory compliance requirements for importation into Australia 5.4 Develop logistics strategies for the organisation taking into account appropriate transport, insurance and regulatory compliance requirements 5.5 Gain approval from relevant personnel for implementation of logistics strategies
6. Evaluate international procurement strategies	6.1 Review implementation of international procurement strategies and identify improvements 6.2 Design and develop improved international procurement strategies in accordance with organisational policies and procedures 6.3 Gain approval from organisational management to implement improvements to international procurement strategies 6.4 Communicate changes to relevant stakeholders and identify support provided to implement improvements 6.5 Monitor and review implementation of changes to determine effectiveness of improvements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets complex textual information and determines how content may be applied to organisational requirements
Writing	• Develops and revises strategic, contractual and purchasing material to appropriate to audience and context • Completes authorisations according to requirements
Oral Communication	• 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

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Numeracy	• Interprets financial information and makes calculations when considering commercial risks, purchasing strategies and insurance requirements
Navigate the world of work	• 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	• 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	• Develops plans to manage complex international purchasing activities in a timely and logical manner • Uses analytical skills to consider potential and actual problems and implement solutions or contingency plans • Monitors outcomes of decisions, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable to future situations

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBPRC503 Manage international procurement Release 3	BSBPUR503 Manage international purchasing Release 2	Title change, updates to elements and performance criteria, performance and knowledge evidence.	Equivalent unit

Links

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

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Assessment Requirements for BSBPRC503 Manage international procurement

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- undertake research and analysis of international procurement strategies
- effective communication and negotiation with stakeholders and suppliers
- design and develop international procurement strategies for an organisation, including:
  - implementation of international procurement strategies in an organisation
  - completion of a complex international purchase
  - assessment of financial records to complete payment for goods and/ or services
  - prepare contract documentation
  - evaluation of transport and logistics strategies to obtain goods and/ or services procured internationally.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of international markets and cultural considerations relevant to procurement in supplier countries
- key features of methods of payment applicable to international procurement
- contract documentation and processes for accessing legal advice
- key components of organisational policies and procedures for international procurement
- key details of available agencies involved in arranging importation arrangements such as:
  - consultants

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- customs brokers
- freight forwarders
- logistics and transport companies.
-

Assessment Conditions

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

- organisation policies and procedures
- purchasing strategies and relevant purchasing records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC504 Manage a supply chain

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to manage a supply chain, including the commercial and technical capabilities to ensure outcomes achieve organisational objectives.

It applies to individuals who are responsible for managing a supply chain in an organisation.

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

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop and implement a supply chain strategy	1.1 Identify the organisation's objectives and the strategies for achieving them 1.2 Review current supply chain management strategy and how it delivers against organisational strategies 1.3 Assess supply chain opportunities that will add value to the organisation within the requirements of the strategy and budgetary allowance 1.4 Design and implement a supply chain strategy that increases effectiveness and achieves organisational objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Gain commitment of stakeholders to implement supply chain strategy 1.6 Assign responsibility to monitor supply chain strategy to relevant personnel
2. Manage the flow of supplies through the supply chain	2.1 Obtain information on the specifications of supplies in the supply chain 2.2 Clarify the aims, objectives and plans of supplies against organisational policies and procedures 2.3 Allocate supply chain tasks to self and other personnel 2.4 Support personnel to achieve supply chain tasks and milestones 2.5 Monitor and control the achievement of supply chain objectives against cost and timescales 2.6 Present reports on the results of supply chain outcomes to stakeholders
3. Manage supply chain relationships and activities	3.1 Apply portfolio analysis techniques to assess relationships in supply chains in accordance with the supply chain management strategy 3.2 Evaluate financial, technical and performance data of suppliers in accordance with supply chain strategies 3.3 Identify opportunities to adjust supply chain strategies to respond to the changing needs of customers, supply chain and organisational objectives 3.4 Design and implement a framework to promote collaboration with suppliers to achieve a competitive advantage 3.5 Consult with organisation management to confirm progress of supply chain activities in accordance to organisational objectives
4. Evaluate and improve supply chain effectiveness	4.1 Review the effectiveness of current relationships within the supply chain in accordance with the supply chain management strategy 4.2 Compare supply chain management models to determine most appropriate infrastructure to support organisational objectives 4.3 Assess techniques to support the development of innovation in the supply chain 4.4 Analyse cost reduction activities for a supply chain to achieve organisational objectives 4.5 Consolidate analysis and evaluation results to improve future supply chain management strategies and seek feedback from

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ELEMENT	PERFORMANCE CRITERIA
	organisation management

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• 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	• Designs, develops and revises strategic documents appropriate to audience and context
Oral Communication	• 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	• Analyses and compares financial information to assist in managing, evaluating and improving the supply chain
Navigate the world of work	• 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	• 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	• 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
BSBPRC504 Manage a supply chain Release 1	BSBPUR504 Manage a supply chain Release 1	Updates to elements and performance criteria, performance and knowledge evidence.	Equivalent unit

Links

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

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Assessment Requirements for BSBPRC504 Manage a supply chain

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- critically evaluate organisational supply chain management
- successfully manage a supply chain in accordance with organisational policies and procedures, including:
  - implement a supply chain strategy
  - monitor supply chain activities
  - co-ordinate staff and engage relevant stakeholders
  - liaise with suppliers to drive efficiencies
- evaluate and formulate recommendations to improve supply chain management strategy.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of organisational objectives and their relationship to the supply chain strategy
- key requirements relating to the management of a supply chain, including:
  - organisational policies and procedures for procurement, tendering and contracting
  - contracting and tendering
  - ethical behaviour
  - purchasing and procurement
  - supply chain management
- techniques to establish collaborative relationships

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- relevant legislation, regulations, standards and organisation policies.

Assessment Conditions

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

- organisation policies and procedures
- supply chain strategies and relevant supply chain management records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBPRC505 Manage ethical procurement strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to employ ethical procurement processes and policies to identify suppliers' contribution to improve the ethics of that specific supply chain, such as waste, water, emissions, materials, service and innovation.

It applies to individuals who manage the ethical procurement of goods and/ or services from a variety of sources. While an individual may work closely with other staff members in the organisation, they have individual responsibility and autonomy to identify ethical procurement risks, develop management programmes and evaluate suppliers against organisation ethical procurement policies and procedures.

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

Unit Sector

Procurement - Contracting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify vulnerability and risk associated with procurement	1.1 Research and identify ethical procurement policies and procedures and their alignment to organisational objectives 1.2 Determine specifications of goods and/ or services to be procured 1.3 Assess ethical vulnerabilities and risks associated with

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ELEMENT	PERFORMANCE CRITERIA
	procurement of goods and/ or services in accordance with organisational policies and procedures 1.4 Document and report ethical procurement vulnerabilities and risks to stakeholders
2. Develop ethical procurement strategy	2.1 Develop organisational ethical procurement strategy in accordance with organisational policies and procedures 2.2 Assign responsibility to relevant personnel for the monitoring of ethical procurement strategy 2.3 Seek endorsement of ethical procurement strategy from organisational management
3. Evaluate suppliers and offers	3.1 Engage suppliers in ethical procurement objectives 3.2 Analyse supplier ethical procurement against key performance indicators 3.3 Evaluate and select suppliers with negative ethical procurement impacts 3.4 Confirm and agree chosen supplier with organisational management
4. Create contract and performance indicators	4.1 Establish contract documentation in accordance with ethical procurement strategies and organisational policies and procedures 4.2 Communicate the contents of the contract, emphasising ethical procurement requirements 4.3 Determine arrangements for delivery of goods and/ or services to be satisfactory to both organisation and supplier 4.4 Implement relevant ethical procurement key performance indicators to measure supplier against organisational objectives 4.5 Establish ongoing dialogue with supplier to facilitate transparency and accountability
5. Evaluate and update ethical procurement strategy	5.1 Evaluate supplier against ethical procurement performance indicators 5.2 Undertake gap analysis between desired and actual performance, and establish new goals 5.3 Embed recognition and reward for good supplier practice 5.4 Consult with stakeholders to confirm revised ethical procurement strategy

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Analyses, matches and interprets information, paying attention to detail to identify errors
Writing	• Records information accurately using correct spelling, grammar and terminology
Oral Communication	• Uses questioning and active listening to convey and clarify information and instructions
Numeracy	• Performs mathematical analysis to verify financial information
Navigate the world of work	• Follows legislative requirements, and organisational protocols, policy and procedures relevant to own role
Interact with others	• Uses correct communication practices and protocols to obtain strategy approval from stakeholders
Get the work done	• Plans, organises and implements tasks according to organisational requirements • Responds to problems by implementing standard or logical solutions

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBPRC505 Manage ethical procurement strategy Release 1	Not applicable	New unit	No equivalent unit

Links

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

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Assessment Requirements for BSBPRC505 Manage ethical procurement strategy

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- develop ethical procurement strategies for an organisation, including:
  - researching and documenting ethical procurement vulnerabilities and risks
  - evaluating suppliers through ethical procurement performance indicators
- liaise with stakeholders and suppliers to effectively facilitate ethical procurement
- evaluate and implement improvements to procurement strategies in an organisation.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation that affect procurement and contracting
- key indicators to evaluate ethical procurement supplier performance
- key ethical procurement vulnerabilities and risks
- organisational policies and procedures related to:
  - ethical business terms and conditions for procurement
  - contracting and tendering
  - supply chain management
  - procurement.

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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 – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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

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

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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

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

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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

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

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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

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

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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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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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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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BSBRES411 Analyse and present research information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to gather, organise, analyse and present workplace information using available systems and sources. This includes identifying research requirements and sources of information, applying information to a set of facts, evaluating the quality and reliability of the information, and preparing and producing reports.

It applies to individuals in roles in which they 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 predictable and 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. Identify reliable sources of research information	1.1 Identify potential sources for research information relevant to the organisation requirements 1.2 Assess reliability of potential sources, considering accuracy, authority, audience, relevance and likelihood of bias 1.3 Access research information and extract in a format suitable for analysis, interpretation and dissemination in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements 1.4 Store research information, in accordance with organisational requirements
2. Analyse and synthesise research information	2.1 Clearly define objectives of research ensuring consistency with organisational requirements 2.2 Ensure that information research strategies are relevant to the requirements of the research and aligned to organisational objectives 2.3 Apply information research strategy to obtain relevant information, identifying themes and drawing conclusions in line with established objectives of research 2.4 Demonstrate that assumptions and conclusions used in analyses are clear, justified, supported by evidence and consistent with research and business objectives
3. Present research information	3.1 Identify appropriate methods of reporting, considering the intended audience and relevant organisational requirements 3.2 Report on findings in an appropriate format, style and structure within a pre-determined timeframe 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Analyses and evaluates textual information to develop information research strategies, integrate facts and ideas and meet organisational requirements
Writing	• 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	• Presents recommendations and issues using language appropriate to

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Communication	audience and according to organisational requirements
Navigate the world of work	• Recognises and follows organisational policies and procedures and meets expectations associated with own role
Interact with others	• Selects and uses appropriate communication practices when seeking or sharing information
Get the work done	• 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 foreseeable problems in familiar work contexts

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBRES411 Analyse and present research information Release 1	BSBRES401 Analyse and present research information Release 1	Updates to elements and performance criteria, performance and knowledge evidence.	Equivalent unit

Links

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

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Assessment Requirements for BSBRES411 Analyse and present research information

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify research requirements and objectives
- gather, organise and present research information
- communicate effectively with research stakeholders to clarify requirements
- maintain and handle information and documents systematically and securely
- preparing reports on research findings including:
  - recommendations based on the analysis of research information
  - clear and justified assumptions and conclusions
  - use of efficient and reliable research methods
- analyse, evaluate and interpret research information to support organisational activities.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of organisational policies and procedures relating to:
  - the access of digital information
  - the storage/transmission of information
  - legal and ethical obligations relating to workplace information
- key concepts related to research and analysis including reliability and validity
- key features of research processes and strategies to identify new sources (online and print) of information and efficient and effective use.

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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 in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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

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

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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

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

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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

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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

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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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.

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Skill	Performance Criteria	Description
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	BSBRKG403C Set up a	Updated to meet	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
business or records system for a small business	business or records system for a small business	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 BSBRKG403 Set up a business or records system for a small business

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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

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- 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.

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 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 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.

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 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

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ELEMENT	PERFORMANCE CRITERIA
	reporting documentation, and allocate these to established functions 1.3 Analyse relationship between programs, projects and supporting activities and functions to identify overlap, ambiguities 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

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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
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 available from 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 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error
Release 1	This version first released with BSB Business Services Training Package Version 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.

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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 available from 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit.
Release 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 micro and small businesses 1.2 Identify products and services not available in the existing market

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ELEMENT	PERFORMANCE CRITERIA
	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 provide products or 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, advisors, 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

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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 Communication	1.4, 3.5	• Articulates clearly and confidently using specific and relevant language suitable to audience
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 Release 2	BSBSMB201 Identify suitability for micro business Release 1	Minor edits to clarify intent of 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 BSBSMB201 Identify suitability for micro business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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
- summarise the business fundamentals that make an idea a viable business proposition
- explain business benchmarking
- describe personal attributes needed to run a successful small business
- explain differences between micro business and large corporations
- identify three training courses or support services available to micro business operators.

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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:

- relevant legislation, regulations, standards and codes
- internet access to research existing market
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB301 Investigate micro business opportunities

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	resources 1.4 Specify and list products and services to match business ideas 1.5 Identify and research potential customer information for business ideas 1.6 Identify and take into account available financial, digital technology, 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

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		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 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 Release 2	BSBSMB301 Investigate micro business opportunities Release 1	Minor edits to clarify intent of 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 BSBSMB301 Investigate micro business opportunities

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 information from a range of sources to investigate a business opportunity, including:
  - financial considerations
  - digital technologies
  - market size, potential and trends
  - ethical and cultural requirements of the market
  - resource availability
- review data for potential impact on the market, products, services and customers
- match products and services to the business opportunity.

Note: If a specific volume or frequency 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 legislation and regulation relevant to specific micro business opportunities being investigated
- identify sources of specialist advice on trends in new and emerging markets and decline and risk factors

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- summarise benefits and challenges of digital technologies relevant to micro business opportunities
- describe appropriate business research methods and data collection tools and software.

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:

- internet access for research
- data collection tools and software
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 outcomes sought 1.5 Assess and match personal skills and attributes against those required 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 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	1.1, 1.3-1.6, 2.1, 2.2,	• Plans and implements tasks required to prepare and

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done	3.2, 3.3	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 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 Release 2	BSBSMB302 Develop a micro business proposal Release 1	Minor edits to clarify intent of 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 BSBSMB302 Develop a micro business proposal

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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
  - digital technologies including e-commerce
  - risk identification and assessment
  - personal skills and attributes analysis against required skills
  - financial returns
- 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 relevant government legislative requirements relating to micro business operations
- explain how to manage income and expenditure costing for a micro business
- discuss regulations and codes of practice relevant to micro business operation
- outline principles of risk assessment relevant to the business opportunity

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- describe at least three different business proposal formats or methods of presentation.

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:

- business technology including internet access
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version first released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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	1.1 Realistically detail personal, family or community financial situation showing funds available and commitments already incurred

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ELEMENT	PERFORMANCE CRITERIA
or equity for the business	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 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	Description

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	Criteria	
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
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 tone 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	• 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 • 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**
BSBSMB303 Organise finances for the micro business Release 2	BSBSMB303 Organise finances for the micro business Release 1	Minor edits to clarify intent of unit	Equivalent unit

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Links

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Assessment Requirements for BSBSMB303 Organise finances for the micro business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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, commitments 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 micro 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
- explain key financial terminology relevant to micro business
- describe the relationship between finances and business sales and marketing strategies
- describe methods of costing or pricing and preparation of financial forecasts

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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:

- business technology including internet access
- specialist accounting software
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 2	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

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Gather information regarding resource requirements from appropriate sources 1.3 Investigate digital technology options, benefits and challenges 1.4 Determine resource quantities in accordance with business activity levels and financial position
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

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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 done	1.1-1.3, 2.1-2.4, 3.1, 3.4	• 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 • 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 • Takes responsibility for planning and organising own and others workload, identifying ways of sequencing and combining elements for greater efficiency

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB304 Determine resource requirements for the micro business Release 2	BSBSMB304 Determine resource requirements for the micro business Release 1	Minor edits to clarify intent of unit	Equivalent unit

Links

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Assessment Requirements for BSBSMB304 Determine resource requirements for the micro business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 micro business profile and desired profit
- identify, assess and select digital technologies
- select options for resource acquisition suited to the micro business and financial position, including stakeholder needs
- establish relationship with suppliers including negotiating and reviewing supplies to suit profile of micro 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 legislative requirements relating to micro business operations
- describe the functions of key digital technologies and their benefits and challenges to micro business
- list functions of a range of business equipment and machinery
- outline the micro business profile and structure
- describe procedures and systems for use of and routine maintenance of resources

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- summarise types of resources required as per the micro business profile.

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:

- business equipment and resources including maintenance manuals
- business technology including internet access
- relevant workplace documentation and resources including a business profile sample
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version first released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Investigate relationships between legislation, regulations, codes of practice, associated standards and written material to determine compliance requirements of the business
2. Develop procedures to ensure compliance and risk minimisation	2.1 Identify business advisors and other sources of assistance relevant to compliance requirements and business type 2.2 Explain business type and operations to advisors, covering full scope of the business 2.3 Clarify and confirm compliance requirements and risk minimisation needs with advisors 2.4 Access 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

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		• Uses formal and informal mathematical language to discuss compliance
Navigate the world of work	1.1, 1.3, 3.1, 3.2	• 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 routine tasks with familiar goals and outcomes, taking some limited responsibility for decisions regarding sequencing and timing • 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 Release 2	BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business Release 1	Minor edits 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 BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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, select and access 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 advisors).

Note: If a specific volume or frequency 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 micro business registration and licensing requirements
- list government legislative requirements relating to business operation
- categorise the nature of legal responsibility
- pinpoint relevant industry codes of practice
- list relevant WHS responsibilities and procedures
- 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:

- business technology including internet access for research
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 viability and create a plan to operate a business in the home environment.

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

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ELEMENT	PERFORMANCE CRITERIA
	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 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

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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
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	• Takes responsibility for planning and organising own workload, identifying ways of sequencing work efficiently • Takes responsibility for outcomes of decisions related directly to own role • Recognises and takes responsibility for addressing and rectifying potential problems in the work place

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB306 Plan a home based business Release 2	BSBSMB306 Plan a home based business Release 1	Minor edits 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 BSBSMB306 Plan a home based business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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
  - identifying and meeting required legislative requirements
- 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 prohibitive factors in setting up a home based business
- list commonwealth, state/territory and local government legislative requirements relating to business operation, especially for work health and safety (WHS) and environmental issues
- outline constraints of home based businesses

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- summarise relevant services and available infrastructure.

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:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB307 Set up information and communications technology for the micro business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 micro 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

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ELEMENT	PERFORMANCE CRITERIA
	fulfil business requirements 1.3 Identify suitable suppliers of hardware, software and appropriate support services 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

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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 done	1.1-1.4, 2.1-2.4, 3.1, 3.2, 3.4	• 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 • Initiates standard procedures when responding to familiar problems within immediate context • 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 Release 2	BSBSMB307 Set up information and communications technology for the micro business Release 1	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 and 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 work health and safety (WHS) procedures for using electronic equipment
- identify current and relevant software packages for business 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:

- business technology
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB308 Improve energy efficiency in micro or small business operations

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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

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ELEMENT	PERFORMANCE CRITERIA
	significant expenses for the business 1.3 Collect information from a range of sources about energy saving options to identify areas for improvement
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 implement 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

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Interact with others	3.4	• 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, 1.3, 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 Release 2	BSBSMB308 Improve energy efficiency in micro or small business operations Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB308 Improve energy efficiency in micro or small business operations

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 people 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:

- business equipment and resources
- relevant legislation, regulations, standards and codes

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- relevant workplace documentation and resources
- case studies or where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB401 Establish legal and risk management requirements of small business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 comply with all regulations affecting the business.

It applies to individuals operating a small business who use analytical skills to interpret legislation and regulations and develop procedures to manage compliance.

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

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ELEMENT	PERFORMANCE CRITERIA
	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 legislation, codes and regulatory requirements	2.1 Establish systems to ensure legal rights and responsibilities of the business are identified and the business is adequately protected, specifically in relation to work health and safety (WHS), 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 and 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 options for leasing or ownership of business premises and complete contractual arrangements in accordance with the business plan
4. Identify and treat business risks	4.1 identify potential internal and external risks to the business 4.2 assess the probability and impact of identified risks 4.3 prioritise risks for treatment 4.4 develop actions to mitigate risks including identifying insurance requirements and adequate cover

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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, 2.1-2.4, 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, 3.1, 3.3, 3.5	• Prepares written reports and workplace documentation that communicate complex information clearly and 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 tone and 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	• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency • Implements actions as per plan, making adjustments if necessary and addressing unexpected issues • Understands importance of secure information and privacy 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 constraints into account

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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 Release 2	BSBSMB401 Establish legal and risk management requirements of small business Release 1	Minor edits to clarify intent of 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 BSBSMB401 Establish legal and risk management requirements of small business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 regulatory requirements, specifically in regard to WHS, business registration and environmental requirements
- ensure compliance, by:
  - following taxation and industrial relations 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
  - identifying options of leasing or ownership of business premises.
- Identify, assess and treat risks specific to the business including
  - prioritising risks with highest probability of occurrence and greatest negative impact on the business
  - identifying insurance requirements

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 business registration and licensing requirements
- identify all government legislative requirements relating to the specific business operation
- explain creation and termination of relevant legal contracts
- 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
- outline the key steps in the risk management process
- 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
- business technology including internet access
- specialist software for analysis of data
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies, or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 and interpret financial data.

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 business products and services 1.2 Calculate prices based on costs and profit margin, as an hourly

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ELEMENT	PERFORMANCE CRITERIA
	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 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 or 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,	• Identifies, analyses and evaluates complex information from a range of sources

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	3.2	
Writing	1.1, 1.5, 2.1, 2.4, 3.2	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
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 tone and 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 complex activities, including implementing and monitoring 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 Release 2	BSBSMB402 Plan small business finances Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB402 Plan small business finances

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 financial 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 or 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

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    - purpose of financial reports
- explain relevant accounting terminology
- describe working capital cycles.

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:

- software for financial calculations
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB403 Market the small business

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to monitor and improve business performance via a clear marketing strategy integrated into 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.

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

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ELEMENT	PERFORMANCE CRITERIA
	business as a basis for marketing objectives and strategies 1.3 Conduct a competitor analysis to inform development of marketing strategies 1.4 Determine marketing objectives in consultation with relevant people and in accordance with the business plan 1.5 Ensure strategies are ethically and culturally appropriate and aligned with customer and industry expectations
2. Determine a marketing mix for the business	2.1 Assess product mix, volumes and pricing opportunities to determine marketing focus and optimise profit 2.2 Evaluate costs and benefits of using different distribution channels or providing different levels of customer service, and consider results in determining marketing mix 2.3 Determine marketing and promotional activities including the role of digital engagement to suit target market 2.4 Consider the customer journey and conversations in determining marketing mix
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 marketing activities, in accordance with marketing objectives and budgetary requirements 3.3 Consider digital devices, platforms and technologies for effectiveness in implementing marketing activities
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 and expectations in both on-line and off-line environments to identify opportunities for change and improvement 4.6 Identify and respond to opportunities to aid business development through new technologies and different ways of

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ELEMENT	PERFORMANCE CRITERIA
	marketing

Foundation Skills

This section describes language, 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, 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	• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency • 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

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		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 Release 2	BSBSMB403 Market the small business Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB403 Market the small business

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- determine marketing activity focus in line with objectives of the business plan
- 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
- identify marketing opportunities in the digital environment
- develop approaches to engage, respond and monitor customers in the digital space
- 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:

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- 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
- compare current digital devices, platforms and technologies for effectiveness in achieving marketing objectives
- outline methods of monitoring customer satisfaction
- identify relevant market analysis and research
- provide a detailed explanation of relevant marketing concepts and methods.

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:

- business technology
- software for analysis of data
- workplace documents and case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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.

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

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ELEMENT	PERFORMANCE CRITERIA
2. Develop a business plan	2.1 Research resources, legal and compliance requirements, specifically in relation to work health and safety (WHS), in accordance with business goals and objectives 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 or means of production or operation from production or operations plan to conform with business goals and objectives 2.6 Identify staffing requirements to effectively produce or deliver products and services 2.7 Identify, assess and prioritise internal and external risks 2.8 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	1.1, 3.1	• Articulates ideas and requirements clearly and

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Communication		creatively based on techniques appropriate to assess business performance
Numeracy	2.2, 2.3, 2.5-2.7	• Interprets numerical information to determine prospective markets, resource allocations and business profits/losses
Navigate the world of work	2.1, 3.2	• Appreciates implications of legal and regulatory responsibilities related to own work
Interact with others	3.1	• Looks for strengths in others, finding ways of working with and building on these and sharing own knowledge and experience freely
Get the work done	1.1, 1.2, 2.1-2.7, 3.2, 3.3	• Uses a combination of formal, logical planning processes and an increasingly intuitive understanding of context to identify relevant information and to evaluate alternative 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**
BSBSMB404 Undertake small business planning Release 2	BSBSMB404 Undertake small business planning Release 1	Updated to clarify intent	Equivalent unit

Links

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Assessment Requirements for BSBSMB404 Undertake small business planning

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 or services to facilitate all business goals and objectives
- identify and plan all work health and safety (WHS) and duty of care responsibilities
- identify and assess internal and external risks to the business
- 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 all government legislative requirements relating to business operation, especially in regard to WHS and environmental issues, equal employment opportunity, industrial relations and anti-discrimination
- 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 small business planning
- outline common risks particular to the small business type or industry
- explain reasons for, and benefits of, business planning

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- clarify relevant industry codes of practice
- outline setting goals and objectives
- explain types of business planning – feasibility studies; strategic, operational, financial and marketing 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 – Small and Micro Business field of work and include access to:

- business equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	business plan 1.2 Identify and compare existing skills of owner/s and staff with business requirements to identify any gaps 1.3 Develop policies and procedures for owner/s and staff, in accordance with the business plan
2. Recruit, induct, train and retain team	2.1 Develop job or 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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, 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, 2.2-2.4, 3.1, 3.2, 4.2, 5.3, 5.4, 6.1, 6.2, 6.4, 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 tone and language suitable to audience

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Numeracy	6.4	• Uses basic mathematical formulas to review staff performances within available work schedules
Navigate the world of work	1.3, 2.2. 3.1, 4.1	• Understands own legal rights and responsibilities and is extending understanding of general legal principles across work contexts • Monitors adherence to organisational policies and procedures and considers own role for its contribution to broader goals of the work environment
Interact with others	2.4, 2.6, 5.3, 6.1, 6.5	• 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 • Looks for ways of establishing connections and building genuine understanding with a diverse range of people • Actively identifies important communication exchanges, selecting appropriate channels, format, tone and context to suit purpose and audience, and monitors impact
Get the work done	1.1, 1.2, 2.2, 2.3, 2.5, 4.2, 5.1, 5.2, 5.5, 6.3, 6.6	• Uses digital technologies and systems safely, legally and ethically when gathering, storing, accessing and sharing information • 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 • Uses formal and informal processes to monitor implementation of ideas and reflect on outcomes • 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**
BSBSMB407 Manage a small team Release 2	BSBSMB407 Manage a small	Updated to clarify intent	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
	team Release 1		

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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
  - coordinate skill-gap training where required
  - develop human resource 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.

Note: If a specific volume or frequency 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 all government legislative requirements relating to staffing the business operation

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- explain work health and safety (WHS) responsibilities and procedures for managing hazards
- summarise relevant industry awards or enterprise agreements
- outline staff development pathways
- identify training course options for staff development
- summarise staff counselling, grievance and disciplinary procedures
- identify unfair dismissal legislation and procedures.

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:

- business equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 interpersonal 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	1.1 Identify personal, family, cultural and community contexts the

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ELEMENT	PERFORMANCE CRITERIA
business commitments/ obligations within family, cultural and community contexts	business operates in 1.2 Identify personal, family, cultural and community commitments and obligations that impact the business 1.3 Consider strategies to address and minimise negative impacts these commitments or obligations may have on the business 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 or community environments
3. Review work practices within family, cultural and community contexts	3.1 Monitor personal, family, cultural and community commitments or obligations to identify any changes that might impact the business 3.2 Review plans and strategies to ensure negative impacts of any commitments or 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	3.2	• Recognises and interprets textual information to address improvements to work practices
Writing	2,1, 1.4, 2.3	• Uses clear and specific terminology to complete and update workplace documentation
Oral	1.1, 1.2, 3.1, 3.2	• Clearly articulates requirements using language appropriate to audience and environment, and

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Communication		participates in verbal exchanges of ideas/solutions • Participates in verbal negotiations using tone and language suitable to audience
Navigate the world of work	2.1	• Recognises complexity of factors influencing career decisions and career developments
Get the work done	1.1-1.4, 2.2, 2.3, 3.1-3.3	• Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals • 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

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB408 Manage personal, family, cultural and business obligations Release 2	BSBSMB408 Manage personal, family, cultural and business obligations Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB408 Manage personal, family, cultural and business obligations

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- undertake a detailed analysis of implications of family, cultural and community obligations and commitments on self, staff and the business
- clarify a culturally appropriate work ethic and ensure workability of plans and strategies for maintaining this ethic
- produce plans and strategies addressing negative impacts 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:

- explain central characteristics of the small business and its environment
- discuss community and family expectations and dynamics
- summarise cultural and family relationships
- outline historical, cultural, ceremonial, religious or family issues relevant to specific communities
- identify life work balance, particularly relating to health
- describe local community and relevant organisations and persons within the 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 Management and Leadership – Small and Micro Business field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 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 with important stakeholders and modify interactions as required.

It applies to individuals who operate a small business and use communication skills to build relationships with key stakeholders.

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, stakeholder expectations and preferences and agreed roles and responsibilities

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ELEMENT	PERFORMANCE CRITERIA
	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 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 implement actions 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	• 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, and uses terminology appropriate to present to relevant personnel
Oral	1.1, 2.3, 3.1	• Clearly articulates requirements using language appropriate to audience and environment, and

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Communication		participates in a verbal exchange of ideas/solutions • Participates in constructive negotiations using tone and language suitable to audience
Navigate the world of work	1.1, 1.3, 1.4, 2.1	• Regularly reviews current situation and future career and work options, developing strategies to address some factors that may limit choices, and accepting those that may be outside own control at a particular point in time • Monitors adherence 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, 1.2, 2.2, 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 • Looks for ways of establishing connections and building genuine understanding with a diverse range of people • Actively identifies important communication exchanges, selecting appropriate channels, format, tone and context to suit purpose and audience, and monitoring impact
Get the work done	1.1, 1.4, 2.1, 3.1, 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 • Makes 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 • 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**
BSBSMB409 Build and maintain	BSBSMB409 Build and maintain	Updated to clarify intent	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
relationships with small business stakeholders Release 2	relationships with small business stakeholders Release 1		

Links

Companion Volume implementation guides 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- identify key stakeholders expectations and preferences, particularly those with legislative impact on the business
- demonstrate methods of working and communicating with key stakeholders based on roles and responsibilities, codes of practice, stakeholder expectations and cultural protocols
- undertake a detailed analysis of roles, responsibilities, duties and tasks of small business personnel to align with key stakeholder relationships
- determine process for reviewing 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:

- identify the role, relationship and impact on the business of key stakeholders
- discuss business ethics
- explain codes of practice for the business
- compare communication styles and mechanisms
- outline principles of 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 Management and Leadership – Small and Micro Business field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 and implement 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

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ELEMENT	PERFORMANCE CRITERIA
	is used for 1.3 Decide what will be measured, and how 1.4 Source and use technologies or tools to 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 business 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, 3.1, 3.2	• Organises, evaluates and critiques information from a range of textual material

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Writing	1.1, 1.4, 3.1, 4.3	• Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations
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, 2.4	• Uses listening and questioning skills 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
Navigate the world of work	4.3	• Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader workplace goals
Get the work done	1.1-1.4, 2.3, 3.1, 3.2, 4.1, 4.2	• Plans a range of routine and some non-routine tasks accepting stated goals and aiming to achieve them efficiently • In more complex, non-routine situations, uses formal decision-making process with support, setting or clarifying goals, gathering information and evaluating several choices against a limited set of criteria • 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 • Applies problem-solving processes when tackling unfamiliar problems, breaking complex issues into manageable parts and identifying and evaluating several options for action

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 Release 2	BSBSMB410 Review and implement energy efficiency in business operations Release 1	Updated to clarify intent	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 BSBSMB410 Review and implement energy efficiency in business operations

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 or technologies
- 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
- identify at least three different tools or technologies to monitor and measure energy use suitable for small 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.

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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:

- business equipment and resources
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB411 Manage specialist external advisory services

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 identifying, selecting and monitoring specialist services or external contractors.

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 or knowledge gaps within the business to determine nature of external expertise required 1.2 Research specialist services to determine if there are any specific industry or regulatory requirements that apply

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Prioritise services required by the business and document according to business procedures 1.4 Determine estimated cost of services and identify budget or 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 business requirements 2.2 Establish process and criteria for shortlisting potential advisors or contractors 2.3 Select most suitable applicant according to established criteria 2.4 Document selection process and outcome 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 3.5 Familiarise specialist advisor with the business and relevant 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 4.3 Collaborate to raise any issues or concerns, and follow-up and document 4.4 Organise progress and final payments against milestones and key deliverables in a timely manner 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 • Participates in a verbal exchange of ideas/solutions and uses appropriate, detailed and clear language to address key personnel and to disseminate information
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 and considers own role in terms of its contribution to broader workplace goals
Get the work done	1.1, 1.3, 1.4, 2.1-2.3, 3.3, 4.1, 4.4, 4.5	• Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints • In more complex, non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and evaluating several choices against a limited set of criteria • Recognises value of continuous improvement within own work context where this involves incremental change • Applies problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action • Uses both formal and informal processes to monitor implementation of solutions and reflect on outcomes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSMB411 Manage specialist external advisory services Release 2	BSBSMB411 Manage specialist external advisory services Release 1	Updated to clarify intent	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB411 Manage specialist external advisory services

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent of unit
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 or knowledge gaps of the business
  - identifying relevant industry, regulatory and organisational requirements
- document selection process and outcomes according to business procedures
- agree on and document services to be provided with the successful advisor or contractor
- provide successful advisor or contractor 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 key steps in engaging external specialist advisors or services
- describe negotiation and conflict-resolution strategies
- summarise business and industry requirements relating to specialist advisory services for the business:
  - required licences, industry registration, government approval, and professional membership

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- minimum qualifications
- vendor approval or certification.

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:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB415 Refine and strengthen a small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to formulate and implement actions to develop and sustain a small business.

It applies to individuals who run a small business that operates independently, or as part of a larger organisation. Individuals in this role interpret business information and numerical data competently to plan, direct and control a small business, make strategic decisions and take action.

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. Investigate opportunities and ideas for business development	1.1 Conduct an internal assessment of the performance of the business and its operations to identify potential efficiencies 1.2 Review the external business environment and identify emerging trends, disruptions and potential threats 1.3 Consult with relevant stakeholders and specialist services or sources of advice to gain feedback on development possibilities 1.4 Consider development options specific to the type of business,

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ELEMENT	PERFORMANCE CRITERIA
	market or industry life cycle stage utilising benchmarking, research and innovation
2. Formulate strategies	2.1 Based on the outcomes of the analysis, confirm or modify the business objectives 2.2 Develop a set of strategies and specific actions for both the short and long term incorporating regulatory, social, economic, ethical and environmental responsibility factors into the decision- making process 2.3 Align the strategies to the business resource and capability limitations
3. Implement the strategies	3.1 Access and allocate resources 3.2 Establish a framework for implementation that covers equipment, infrastructure and personnel 3.3 Design controls to monitor progress and take action to correct any issues 3.4 Demonstrate leadership by providing direction and motivation to others to encourage contribution to business success
4. Monitor the implementation of the strategies	4.1 Assess the outcomes of the strategies and actions against business objectives and performance targets 4.2 Consider further innovations or efficiencies that would contribute to business sustainability 4.3 Determine any adjustments to the strategies and actions to accommodate changes in the internal or external situation 4.4 Document and communicate the changes 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, 1.2, 1.4	• Identifies, analyses and evaluates a range of textual information to determine options, opportunities and challenges, as well as legislative and regulatory

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		requirements of using digital technologies
Writing	2.1-2.3, 3.2, 3.3, 4.4	• Prepares documents according to organisational requirements • Creates texts using formats and language appropriate to the audience and context
Oral Communication	1.3, 3.4, 4.4	• 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	1.1, 1.4, 3.1, 3.3 4.1	• Interprets and uses mathematical equations to analyse and compare businesses, and identify and quantify opportunities • Designs controls to monitor and measure outcomes
Navigate the world of work	2.2	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	1.3, 3.4, 4.4	• Selects and uses appropriate conventions and protocols when communicating with specialist advisors to seek or share information • Plays a lead role in motivating and providing direction to others to elicit positive outcomes
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.4, 4.1-4.4	• 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 a systematic, analytical approach to gather relevant information, identify and evaluate options and opportunities, and allocate resources • Creates and innovates to develop ideas and opportunities for implementation • Evaluates outcomes of strategies to identify opportunities for improvement, and make adjustments as appropriate

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB415 Refine	Not applicable	New unit	No equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
and strengthen a small business			

Links

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

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Assessment Requirements for BSBSMB415 Refine and strengthen a small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- identify regulatory, social, economic, ethical and environmental responsibility factors impacting on small business development opportunities
- assess the internal and external business environment and determine realistic opportunities, strategies and actions to develop or sustain the business for both the short and long term
- develop an implementation plan to meet business objectives that includes:
  - specific actions and strategies
  - resource allocation
  - timeframes
  - roles and responsibilities
- communicate with relevant stakeholders to gain information and advice to inform the development actions and strategies
- identify efficiencies and innovations that support business sustainability
- implement controls to monitor progress
- assess progress and adapt strategy to accommodate changes.

Note: If a specific volume or frequency 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 market and industry life cycle stages
- outline key steps in business environment analysis
- describe three ethical issues that can arise in small business
- identify the key factors in sustainable business management

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- explain the principles of leadership for small business
- discuss the different actions and strategies for small business development appropriate for particular business type, size and industry.

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:

- relevant workplace documentation and resources
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB417 Recruit staff

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to prepare a job description and recruit new staff to meet business needs.

It applies to individuals who run a small business that operates independently, or as part of a larger organisation. They have responsibility for defining future personnel requirements, determining job specifications, evaluating and selecting candidates, and recruiting staff.

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. Plan for future staff requirements.	1.1 Calculate staffing requirements and determine the nature of employment 1.2 Determine the competencies and attitudes required 1.3 Develop a job description or position statement that accurately reflects the requirements of the role and meets legislation, codes, national standards and work health and safety (WHS) obligations 1.4 Consult with other staff where relevant to confirm requirements 1.5 Allocate budget and resources to the recruitment and selection process

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ELEMENT	PERFORMANCE CRITERIA
2. Conduct a selection process	2.1 Choose an appropriate strategy to advertise vacancies 2.2 Determine if other people will be involved in the selection process and the nature of their input 2.3 Decide on the information required from candidate and selection criteria to be applied 2.4 Assess candidates against selection criteria 2.5 Short-list candidates and schedule interviews or skills demonstrations if applicable and advise relevant people of times, dates and venues 2.6 Contact referees for referee reports and investigate external sources of information about the candidate 2.7 Select the preferred candidate based on information gained
3. Recruit and induct staff	3.1 Secure preferred candidate's agreement 3.2 Advise unsuccessful candidates of outcomes and respond to any feedback requests 3.3 Prepare an employment contract covering conditions of employment and other documentation or forms required 3.4 Arrange for successful candidate’s induction into 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, 2.4-2.7	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Analyses and evaluates a range of textual information to determine staff requirements of the organisation, and suitability of candidates
Writing	1.1-1.4, 2.3, 2.4, 3.1-3.3	• Researches and develops documents that communicate effectively, attracting suitable candidates for available positions, and reflect all applicable legislative and national standards obligations • Creates texts using formats and language appropriate to the audience and context

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Oral Communication	1.4, 2.5, 2.6, 3.1, 3.2, 3.4	• 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	1.1, 1.5	• Uses basic numeracy skills to calculate staffing requirements, and resources and budget needed for the recruitment process
Navigate the world of work	1.3, 3.3	• Recognises and adheres to legislative requirements and organisational policies and procedures associated with the recruitment process
Interact with others	1.4, 2.5, 2.6, 3.1, 3.2, 3.4	• Selects and uses appropriate conventions and protocols when communicating with internal stakeholders, as well as candidates and their referees, to seek or share information
Get the work done	1.1-1.3, 1.5, 2.1-2.7, 3.1-3.4	• Plans and organises workload, information, and recruitment that ensures compliance with organisational policies and procedures, national standards and legislative requirements • Uses systematic, analytical processes to define staffing needs, attract suitable candidates and select and recruit appropriate candidates

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB417 Recruit staff	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 BSBSMB417 Recruit staff

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- calculate staffing requirements
- identify the personal attributes, knowledge and skills required for a particular role
- prepare a job description or position statement
- develop selection criteria and interview questions
- participate in interviews and other selection techniques including assessing candidates against selection criteria to short-list them
- obtain referees' reports
- advise unsuccessful candidates of the results
- secure preferred candidate’s agreement and provide an employment contract
- 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:

- explain the differences between employees and contractors
- outline the components of a job description or position statement
- explain legislation relevant to recruitment, selection and induction of staff for small business
- identify sources of information on conditions of employment, including employee entitlements, awards and agreements
- identify potential strategies for advertising vacancies
- outline external sources of information about candidates
- explain a range of interviewing techniques and other selection processes and their application.

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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 policies and procedures
- legislation, regulations, Codes and Standards relevant to staff recruitment, selection and induction
- case studies or, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB418 Manage compliance for small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to develop strategies for managing compliance obligations for small business.

It applies to individuals who operate a small business and require a broad knowledge of regulatory and legislative requirements and who use this knowledge to develop compliance strategies.

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 compliance obligations	1.1 Conduct a search of information on internal and external compliance requirements using appropriate search resources, including relevant Australian and international standards 1.2 Access codes of practice and material that interprets and explains obligations and legislative requirements 1.3 Review information for relevance to own small business operations, products and services 1.4 Identify business-specific compliance requirements, and risks

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ELEMENT	PERFORMANCE CRITERIA
	and consequences of possible breaches
2. Develop strategies to manage compliance requirements	2.1 Design the proposed components of the planned compliance management framework, prioritising areas where breaches have critical implications for the business 2.2 Seek and utilise external expertise or sources of advice 2.3 Allocate responsibilities for compliance functions 2.4 Access resources to implement the compliance strategies
3. Implement and monitor compliance management strategies	3.1 Decide on the interval between regular, cyclical compliance checks 3.2 Communicate compliance requirements to relevant others 3.3 Record timing and outcomes of compliance checks according to business requirements 3.4 Identify instances of non-compliance from compliance checks 3.5 Take action to address non-compliances 3.6 Check non-compliances have been resolved
4. Identify areas for improvement in compliance	4.1 Review the outcomes of compliance checks and identify any operational problems 4.2 Analyse any non-compliance to determine modifications required 4.3 Access and analyse documentation relating to changes in compliance requirements 4.4 Modify compliance management strategies based on information analysed 4.5 Communicate any changes in compliance requirements 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	1.1-1.4, 2.2, 4.1-4.3	• Identifies, analyses and evaluates complex textual information to determine legislative and regulatory

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		requirements, trends and outcomes
Writing	2.1-2.3, 3.2, 4.4, 4.5	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	2.2, 2.3, 3.2, 4.5	• Presents information and seeks advice using language appropriate to audience • Participates in discussions using listening and questioning to elicit advice and to clarify or confirm understanding
Numeracy	3.1, 3.3	• Calculates numerical information relating to time
Navigate the world of work	1.1-1.4, 3.3	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	2.2, 2.3, 3.2, 4.5	• Selects and uses appropriate conventions and protocols when communicating to seek or share information • Plays a lead role in communicating compliance requirements to relevant others
Get the work done	1.1-1.4, 2.1-2.4, 3.1-3.6, 4.1-4.5	• 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 compliance checks to identify issues and opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB418 Manage compliance for small business	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 BSBSMB418 Manage compliance for small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- analyse small business operations to identify compliance requirements and the implications of these for the business
- develop compliance strategies in accordance with regulatory and legislative requirements
- communicate compliance requirements to relevant others
- develop and implement a schedule to carry out regular compliance checks
- record outcomes of compliance checks according to business requirements
- take action to address instances of non-compliance
- analyse outcomes of compliance checks and identify 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:

- outline Australian and international standards, legislation, regulations, industry and organisational codes of practice specific to the small business
- identify external professional, industry based and government sources of advice and expertise
- outline compliance management strategies
- describe methods for carrying out compliance checks.

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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- relevant Australian and international standards, laws, regulations, industry and organisational codes and standards
- appropriate computer resources for online searching
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB420 Evaluate and develop small business operations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to evaluate and develop small business operations.

It applies to individuals who operate a small business which stands alone, or that is part of a department within a larger organisation. Individuals in this role use problem-solving skills and take responsibility for developing approaches to evaluating and developing 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 and evaluate operational strategies and procedures	1.1 Develop a detailed operational plan that sets out clear action points to fulfil on business goals and objectives 1.2 Identify work health and safety (WHS) and environmental issues and implement strategies to minimise risk factors 1.3 Review and evaluate, where appropriate, a quality assurance process for the business in line with industry standards, compliance requirements and cultural criteria 1.4 Develop operational KPIs that align with the business plan 1.5 Align KPIs to business strategies, including utilisation of

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ELEMENT	PERFORMANCE CRITERIA
	existing or new technologies, where practicable, to optimise business performance
2. Implement operational strategies and procedures	2.1 Implement systems to evaluate business performance and customer satisfaction, including by setting key performance indicators or targets 2.2 Implement systems to control stock, expenditure or cost, wastage or shrinkage and risks to health and safety in accordance with the business plan, incorporating new digital technologies where possible 2.3 Identify and manage staffing requirements, considering a range of permanent and flexible arrangements, and adhering to budgetary constraints 2.4 Provide goods or services in accordance with established legal, ethical cultural and technical standards 2.5 Provide goods or services in accordance with time, cost and quality specifications, and customer requirements, incorporating new digital technologies where possible 2.6 Apply quality procedures to address product or service and customer requirements
3. Evaluate business performance	3.1 Use digital technologies to regularly evaluate and review achievement of operational targets to ensure optimum business performance, in accordance with business goals and objectives 3.2 Review and document 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 Update operational policies and procedures to incorporate corrective action
4. Review business operations	4.1 Review and adjust business operations to increase business success, in accordance with business goals and objectives 4.2 Research new and emerging digital technologies periodically, implementing as relevant, in accordance with business goals and objectives 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 those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Evaluates complex text to determine legislative, regulatory and workplace documentation
Writing	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and employs listening and questioning techniques to confirm understanding
Numeracy	• Interprets numerical information to manage performance information and regulate cash flow
Navigate the world of work	• Evaluates adherence to organisational policies and procedures and considers own role for its contribution to broader goals of the work environment • Appreciates implications of legal and regulatory responsibilities related to own work with specific reference to safety
Get the work done	• Reflects on how digital systems and tools are used or could be used to achieve work goals, and begins to recognise strategic and operational applications • Identifies concepts, principles and features of approaches in use in other contexts and considers how these may suit own situation • 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 each experience to reflect on how variables impact decision outcomes, and to gain insights into what constitutes an effective decision in different contexts

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSMB420 Evaluate and develop small business operations	BSBSMB405 Monitor and manage small business operations	Updates to title, elements, performance criteria and assessment requirements	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 BSBSMB420 Evaluate and develop small business operations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- develop strategies and procedures to successfully manage business operations, including:
  - developing an operational plan
  - identifying risk management procedures
  - developing a quality assurance process
  - developing and implementing performance measures
  - utilising existing, new and emerging digital technologies to optimise business performance
- implement and evaluate strategies and procedures developed, including:
  - controlling stock, expenditure, and work health and safety risks
  - identifying and meeting staffing requirements
  - analysing and correcting business problems
  - reviewing and adjusting the business plan
- record and research business improvements, including the potential to implement new and emerging digital technologies
- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of relevant legislation and industry codes of practice
- Key features of methods for implementing operation and revenue control systems

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- Key features of methods for evaluating performance and implementing improvements
- Key features of work health and safety (WHS) responsibilities and procedures for managing hazards
- Key features of relevant principles of risk management, including risk assessment
- Key features of quality assurance system principles and methods
- Key features of the role of digital technologies and innovation in modern business
- Key features of systems to manage staff, stock, expenditure, services and customer service
- Key features of required technical or specialist skills relevant to business operations.

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:

- business equipment and resources, including business technology
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB421 Manage small business finances

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to clarify intent of unit
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to implement and review financial management strategies on a regular basis, including by using new and emerging digital technologies.

It applies to individuals who operate a small business that stands alone, or that is part of a department within a larger organisation. Individuals in this role interpret financial reports and other numerical data to develop financial management strategies.

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 strategy	1.1 Identify financial information requirements and obtain specialist services, as required, to profitably operate the business 1.2 Produce financial budgets or projections, including cash flow

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ELEMENT	PERFORMANCE CRITERIA
	estimates, as required for each forward period, and distribute to relevant people in accordance with legal requirements 1.3 Develop a plan to negotiate and manage business capital to best enable implementation of the business plan 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 in line with the business plan 1.7 Record and communicate financial procedures to relevant personnel to facilitate implementation of the business plan
2. Monitor financial performance	2.1 Use available digital technologies to regularly monitor and report on financial performance targets, and analyse data to establish extent to which the financial goals have been met 2.2 Monitor marketing and operational strategies for their effects on the financial goals 2.3 Calculate and evaluate financial ratios according to own or industry benchmarks 2.4 Assess financial plan to determine whether variations or alternative plans are needed, and change as required 2.5 Undertake research regularly to identify opportunities to implement new and emerging technologies to boost business profitability in accordance with the business plan

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Evaluates complex text to determine legislative, regulatory and workplace documentation
Writing	• Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Oral Communication	• Articulates clearly using specific and relevant language suitable to audience to convey requirements, and employs listening and questioning techniques to confirm understanding

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	• Participates in verbal negotiations using tone and language suitable to audience
Numeracy	• Interprets numerical information to calculate all relevant financial information
Navigate the world of work	• Appreciates implications of legal and regulatory responsibilities related to own work
Interact with others	• Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	• 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 • Uses formal and informal processes to monitor implementation of ideas and reflect on outcomes

Unit Mapping Information

Supersedes and is equivalent to BSBSMB406 Manage small business finances.

Links

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

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Assessment Requirements for BSBSMB421 Manage small business finances

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 5.0. Version created to clarify intent of unit
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- manage the business according to financial goals, including:
  - adhering to legal requirements
  - produce relevant financial projections, including cash flow estimates
  - develop a plan to negotiate and manage business assets and financial capital
  - defining strategies for debt collection and contingencies for debtors
  - managing cash flow
  - defining key performance indicators
  - communicating with relevant people
  - seeking specialist services where required
- monitor the business against financial plan and make changes as required
- identify opportunities to implement new and emerging digital technologies to support the financial management of the business.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of benchmarking

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- Key features of financial decision-making relevant to the business
- Key features of significant financial indicators
- Key purposes of financial reports
- Key features of balance sheet preparation and interpretation
- Key features of debt collection procedures or strategies
- Key features of profit and loss statement preparation and interpretation
- Key features of stock records and stock control relevant to the business.

Assessment Conditions

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:

- business equipment and resources, including business technology
- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB422 Plan small business growth

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to research and develop a plan for achieving small business growth.

It applies to individuals who operate a small business either that operates independently, or that operates as part of a larger organisation. Individuals in this role interpret business information and numerical data competently to develop strategies, 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 growth objectives	1.1 Identify measurable indicators for assessing business success 1.2 Evaluate current scale and success of business against identified indicators 1.3 Review current business objectives and identify key areas of focus for business growth
2. Evaluate mechanisms	2.1 Identify and evaluate the suitability of opportunities for growth

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ELEMENT	PERFORMANCE CRITERIA
for causing growth	2.2 Research funding options, where applicable, to support business growth and assess suitability in line with existing business objectives 2.3 Analyse the business' capacity for growth including legal and compliance obligations/implications and likely disruption to existing business 2.4 Select appropriate opportunities for business growth, considering funding required, likelihood and extent of impact, and any associated risks and challenges
3. Develop a strategy for growth	3.1 Research and model selected opportunities to determine potential return on investment 3.2 Consider roles of existing business employees/personnel and identify any necessary adjustments to the function, structure, or quantity of roles required 3.3 Develop, produce, and deliver a business case for growth in a suitable format for relevant parties 3.4 Integrate, where applicable, growth strategy into business, operational, marketing strategic, financial and production plans where relevant

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, analyses and evaluates a range of textual information to determine goals and objectives, options, opportunities and risks, as well as legislative and compliance implications of pursuing growth strategies
Writing	• Researches and documents growth strategy according to organisational requirements • Creates texts using formats and language appropriate to the audience and context
Oral Communication	• 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	• Interprets and uses mathematical equations to calculate numerical information relating to forecasting, resource use, costs, funding

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	options and revenue streams
Navigate the world of work	• Develops and modifies organisational policies and procedures in accordance with legislative and compliance requirements and organisation goals
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with specialist advisors and other stakeholders to seek or share information • Strategically seeks out relevant individuals to gain their support
Get the work done	• Organises information and own workload • Identifies, analyses and evaluates options using systematic, analytical processes to identify opportunities for growth, weighing costs and benefits of each • Documents goals, objectives and strategies to support growth, and integrates these strategies in other business plans

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB422 Plan small business growth	BSBSMB416 Plan small business growth	Updates to elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB422 Plan small business growth

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify and set measurable indicators for business growth, that are realistic and aligned to business strategy
- evaluate opportunities for business growth and select appropriate opportunities to implement as part of growth strategy
- develop a business case for growth to meet business goals and objectives that includes:
  - key assumptions
  - specific tactics and strategies
  - legal and compliance responsibilities
  - operational considerations including resource requirements
  - risk identification and mitigation strategies
  - financial analysis including cash flow implications
  - due diligence (if a third party is involved)
- communicate effectively with relevant stakeholders
- integrate growth strategy into business planning.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of relevant legislation, regulation, business policy and procedures
- Key features of a business case
- Key principles of risk management

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- Key features of numerous options and strategies for small business growth appropriate for particular business type, size and industry.

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:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources – including policies and procedures
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSMB423 Create a digital technology plan for small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop a plan for identifying and implementing new and emerging digital technologies to achieve small business goals. It involves undertaking a basic review of business digital readiness, identifying opportunities to improve business effectiveness and efficiency, and developing an action plan for implementing digital technologies in a small business.

It applies to individuals who operate a small business either that operates independently, or that operates as part of a larger organisation. Individuals in this role are responsible for adopting and promoting approaches to improve small 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. Analyse and evaluate digital readiness of the business	1.1 Identify existing business processes and document which employ digital technologies effectively in line with business goals and strategies 1.2 Analyse business capacity for implementing new digital technologies, including by considering available budget, and

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ELEMENT	PERFORMANCE CRITERIA
	personnel capabilities 1.3 Research and identify opportunities and challenges associated with the use of digital technologies, including legislative and regulatory requirements
2. Identify and select digital tools and services to maximise business effectiveness	2.1 Identify existing, new, and emerging digital technologies by accessing a range of relevant resources 2.2 Model and evaluate cost, benefits, and likely return on investment for each digital technology in accordance with business policies and procedures 2.3 Identify specialist advisors and associated costs, and seek assistance where required 2.4 Select relevant digital technologies for implementation that most align with business goals and strategies and modelling conducted
3. Develop and document a digital plan aligned with business goals	3.1 Identify and prioritise necessary actions, timeframes, personnel, and resources required to implement chosen digital technologies 3.2 Create and document measurable metrics to determine project success, that are aligned to business goals and strategies 3.3 Plan review of action plan and amend plan as necessary 3.4 Document the action plan in a suitable format and store in accordance with business policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Identifies, analyses and evaluates a range of textual information to determine options, opportunities and challenges, as well as legislative and regulatory requirements of using digital technologies
Writing	• Documents action plan according to business requirements • Creates texts using formats and language appropriate to the audience and context
Oral Communicatio	• Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding

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n	
Numeracy	• Interprets and uses mathematical equations to calculate numerical information relating to time, scheduling, resource use and costs
Navigate the world of work	• Recognises and follows legislative requirements, and organisational policies and procedures associated with own role
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with specialist advisors to seek or share information
Get the work done	• Analyses current practices to identify opportunities to introduce digital technologies • Uses systematic, analytical processes to gather relevant information, and identify and evaluate options • Documents action plans to use digital technologies to support business goals in compliance with legislative and regulatory requirements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSMB423 Create a digital technology plan for small business	BSBSMB413 Design a digital action plan for small business	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBSMB423 Create a digital technology plan for small business

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- identify new and existing digital technologies, assess potential return on investment and evaluate suitability for replacing non-digital processes in a small business
- communicate with specialist advisors to obtain relevant information
- plan and prioritise necessary actions for implementing new digital technologies
- design and document an integrated approach to implementing digital technologies that complies with relevant legislation and business requirements
- develop a process for monitoring key metrics and incorporating modifications to the strategy.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key characteristics, expectations and needs of the small business customer base
- Key features of technology options, benefits and challenges for small business owners related to:
  - online presence
  - digital marketing
  - selling online
  - customer interaction
  - online security
  - supplier interaction

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  - mobile based solutions
  - cloud computing
- Key features of intellectual property and other legislative implications for small business use of digital technologies
- Key features of relevant business strategies, policies and procedures
- Key features of commonly used metrics or analytical tools for assessing performance of digital technologies.

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:

- relevant legislation and regulations
- internet access for online research
- relevant business documentation and resources – including business policies and procedures
- office equipment and resources
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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BSBSUS401 Implement and monitor environmentally sustainable work practices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0. Version created to better align unit to AQF level.

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

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ELEMENT	PERFORMANCE CRITERIA
	environmental/sustainability regulations 1.3 Collect information on environmental and resource efficiency systems and procedures, and provide to the work group where 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

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ELEMENT	PERFORMANCE CRITERIA
	and strategies 4.5 Promote successful strategies and reward participants where possible

Foundation Skills

This section describes language, 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

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		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 complete work tasks and access information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS401 Implement and monitor environmentally sustainable work practices	BSBSUS301 Implement and monitor environmentally sustainable work practices	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 BSBSUS401 Implement and monitor environmentally sustainable work practices

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0. Version created to better align unit to AQF level.

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

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- 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
- 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 or, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSUS402 Implement an environmental management plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to interpret requirements of an organisational environmental management plan and effectively implement it.

It applies to individuals who are responsible for sustainability, either as their primary duty or as a part of a work role.

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

Unit Sector

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. Prepare to implement environmental management plan	1.1 Access and interpret plan and relevant compliance documentation to determine process for implementation 1.2 Prepare schedule for implementation process 1.3 Identify required resources for the implementation in accordance with the schedule 1.4 Identify roles, responsibilities and training needs of individuals and work teams
2. Implement and monitor	2.1 Communicate implementation process to staff

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ELEMENT	PERFORMANCE CRITERIA
the environmental management plan	2.2 Allocate roles and responsibilities, and arrange required training 2.3 Execute implementation process in accordance with schedule 2.4 Provide on-going support to those conducting the plan's activities 2.5 Establish and apply procedures for monitoring activities against achievement targets and adjust resources as necessary
3. Review implementation process	3.1 Review implementation results in accordance with organisational requirements 3.2 Amend process as a result of review or other organisational changes 3.3 Document, maintain and store environmental management records 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	1.1, 1.3, 1.4	• Identifies and analyses complex texts to determine legislative, regulatory and business requirements • Reviews texts to create a working plan and align resources
Writing	1.2, 2.1, 2.2, 2.5, 3.2, 3.3	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	2.1, 2.2, 2.4	• 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	1.3, 2.5	• Applies calculations to identify required resources and timeframes • Monitors results against defined goals and resources
Navigate the	1.4, 2.2, 3.1, 3.3	• Recognises and follows legislative requirements and organisational policies and procedures associated

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world of work		with own role • Allocates roles and enables appropriate training for others
Interact with others	2.1, 2.2, 2.4	• 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	1.1-1.4, 2.2-2.5, 3.1-3.3	• Interprets and implements actions according to the organisational plan, taking responsibility for sequencing and timing of tasks • Schedules to manage tasks for self and others, with an awareness of how implementation contributes to the broader organisation • Analyses outcomes in accordance with organisational requirements to identify opportunities for improvement.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS402 Implement an environmental management plan	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 BSBSUS402 Implement an environmental management plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- interpret an environmental plan to establish underpinning organisational and legislative requirements
- prepare an implementation process schedule that incorporates resource requirements and meets organisational and legislative obligations
- communicate individual roles and responsibilities to staff
- address training and support needs
- implement and monitor the schedule against required outcomes
- review results and prepare required 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 organisational and legislative requirements in relation to environmental management
- explain methods used to identify and address training needs
- describe how resource requirements are identified
- explain methods for creating and communicating schedules
- explain how to monitor, review and record results of the implementation process.

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:

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- relevant legislation and workplace policies and procedures
- interaction with others
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSUS403 Measure, monitor and reduce carbon emissions

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to reduce carbon emissions by effectively measuring, analysing and reducing resource use.

It applies to individuals who are responsible for developing workplace plans and strategies that comply with legislative and best practice requirements.

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

Unit Sector

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. Establish carbon footprint	1.1 Identify sources of carbon emissions within the organisation 1.2 Establish quantity of carbon emissions for each source 1.3 Compile data to determine carbon footprint for work area
2. Plan carbon emissions reduction	2.1 Access and interpret organisational carbon reduction policies and procedures, contractual obligations and legislative requirements 2.2 Research best practice approaches to identify potential ways to reduce workplace carbon emissions 2.3 Provide carbon emissions information to the work team in a

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ELEMENT	PERFORMANCE CRITERIA
	clear, concise and accessible manner 2.4 Seek suggestions and ideas about carbon emissions reduction from the work team 2.5 Calculate costs and savings associated with carbon emission proposals 2.6 Develop a carbon management improvement plan and present to required stakeholders for approval
3. Implement and monitor a carbon management improvement plan	3.1 Communicate plan to work team 3.2 Allocate roles and responsibilities, and arrange required training 3.3 Execute implementation process in accordance with plan 3.4 Provide ongoing support to those conducting the plan's activities 3.5 Establish and apply procedures for monitoring activities against achievement targets and adjust resources as necessary
4. Review carbon management improvement plan	4.1 Review implementation results in accordance with organisational requirements 4.2 Report on implementation results, according to internal and external reporting procedures 4.3 Maintain carbon reduction records accurately and legibly, and store securely

Foundation Skills

This section describes language, 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, 4.1	• Recognises and interprets textual information to establish understanding of current processes and standards • Identifies and analyses complex texts to determine best practice, as well as legislative, regulatory and business requirements • Reviews recorded information to track results of decisions

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Writing	2.3, 2.6, 3.1, 4.2, 4.3	• Researches, plans and prepares documentation using language appropriate to context, tone and audience • Records data and documents using appropriate formats and to organisational requirements
Oral Communication	2.3, 2.4, 2.6, 3.1, 4.2	• Presents information using language and tone appropriate to audience • Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding
Numeracy	1.3, 2.5, 3.5, 4.1	• Interprets and uses mathematical equations to monitor and calculate emissions levels and costs • Calculates resource changes required to meet organisational goals • Measures and reviews progress over time
Navigate the world of work	2.1, 3.2, 4.1, 4.2	• Develops, monitors, reports and modifies organisational policies and procedures in accordance with best practice, legislative requirements and organisation goals • Allocates roles and enables appropriate training for others
Interact with others	2.3, 2.4, 2.6, 3.1, 4.2	• Selects and uses appropriate conventions and accessible language when communicating with internal and external stakeholders to seek or share information • Plays a lead role in consulting and presenting proposals and outcomes to a range of stakeholders
Get the work done	1.1-1.3, 2.1, 2.2, 2.5, 2.6, 3.2-3.5, 4.1, 4.3	• 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

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSUS403 Measure, monitor and reduce carbon emissions	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 BSBSUS403 Measure, monitor and reduce carbon emissions

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- measure carbon emissions and determine carbon footprint for a work area
- present and discuss carbon emissions information
- research and develop an approved carbon management improvement plan
- implement and monitor a carbon management improvement plan, in accordance with legislative and organisational requirements
- report on implementation of a carbon management improvement plan, 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 the term 'carbon footprint'
- list and describe sources of carbon emissions within the organisation
- outline the legislative and regulatory context relevant to carbon management
- outline the organisation’s policies, procedures and practices that relate to the carbon management improvement plan
- summarise the organisational requirements for the storage of carbon reduction records
- explain how to assess training needs within the organisation.

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:

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- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSUS404 Assess, implement, monitor and report on waste management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to develop waste management practices which support sustainable use of resources.

It applies to individuals who are responsible for sustainability, either as their primary duty or as a part of a work role.

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

Unit Sector

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. Conduct a waste assessment	1.1 Identify the organisation’s waste stream 1.2 Classify the organisation's waste into types and categories 1.3 Assess waste quantities by volume or weight over a specified time period 1.4 Identify quantities of recyclable and unavoidable waste 1.5 Identify compliance requirements for disposal of waste

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ELEMENT	PERFORMANCE CRITERIA
	1.6 Identify the current cost of waste disposal
2. Research and prepare a waste management plan	2.1 Identify possible impact of organisational waste management strategies, budget and contractual arrangements on waste management planning 2.2 Use the waste management hierarchy to prioritise waste management practices within the organisation 2.3 Identify and assess existing and potential waste management risks seeking expert advice as required 2.4 Identify resources required to support implementation 2.5 Identify roles, responsibilities and training needs of individuals and work teams 2.6 Document a waste management plan and receive sign off from key stakeholders
3. Implement and monitor a waste management plan	3.1 Communicate waste management plan to staff 3.2 Allocate waste management roles and responsibilities, and arrange required training 3.3 Execute waste management in accordance with plan 3.4 Establish and apply procedures for monitoring waste management 3.5 Document, maintain and store waste management records according to organisational requirements
4. Evaluate and communicate outcomes	4.1 Review implementation results in accordance with organisational requirements 4.2 Identify any changes required to achieve waste management goals 4.3 Prepare report including conclusions and recommendations in a format and style consistent with organisational guidelines 4.4 Present findings and recommendations to key 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	Description

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	Criteria	
Reading	1.1,1.2, 1.4-1.6, 2.1-2.4, 4.1, 4.2	• Identifies and analyses complex texts to determine existing processes, their effectiveness, and alignment with compliance requirements • Reviews texts to identify potential risks of, and resources for, developing new practices
Writing	2.6, 3.1, 3.5, 4.1, 4.2, 4.3	• Researches, plans and prepares documentation using format and language appropriate to context and audience • Maintains documents according to organisational requirements
Oral Communication	2.3, 2.6, 3.1, 3.2, 4.4	• 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	1.3, 1.4, 1.6, 2.4	• Analyses numerical information to assess quantities and calculates metric measurements, quantities, ratios, time and costs using appropriate tools
Navigate the world of work	2.5, 3.2, 3.4, 3.5, 4.1, 4.3	• Establishes and applies organisational procedures in accordance with organisation goals • Arranges training appropriate to work needs and goals of groups and individuals
Interact with others	2.3, 2.6, 3.1, 3.2, 4.4	• 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	1.1-1.6, 2.2-2.6, 3.2-3.5, 4.1, 4.2	• Analyses current practices to identify opportunities for improvement • Uses systematic, analytical processes to set targets, gather relevant information, identify and evaluate alternative approaches • 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
BSBSUS404 Assess, implement, monitor and report on waste management	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 BSBSUS404 Assess, implement, monitor and report on waste management

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- research an organisation's waste stream including:
  - types and volume of waste
  - disposal arrangements and cost
- create and implement a waste management plan, in accordance with legislative and organisational requirements
- report on implementation of waste management plan, 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 the waste management hierarchy and how it could be applied in the organisation
- explain the technique for assessing waste management risk
- outline the legislative and regulatory context relevant to waste management
- outline the organisation’s policies, procedures and practices that relate to the waste management strategy and plan
- explain how to assess training needs within the organisation.

Assessment Conditions

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

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- relevant legislation and workplace policies and procedures
- interaction with others
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSUS405 Assess, monitor and reduce water use

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to recommend methods to reduce water usage as part of a strategy to improve the sustainability of operations within an organisation.

It applies to individuals who are responsible for sustainability, either as their primary duty or as a part of a work role.

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

Unit Sector

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. Establish sources and uses of water	1.1 Identify all water sources 1.2 Identify how water is used 1.3 Determine whether water efficient practices are being used by comparing water source with usage
2. Assess water usage	2.1 Establish water usage over a specified time period 2.2 Establish reasons for unaccounted water 2.3 Estimate projected water usage for the same time period

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ELEMENT	PERFORMANCE CRITERIA
	2.4 Calculate difference between projected and actual usage 2.5 Establish reasons for difference between projected and actual usage
3. Identify water efficient practices	3.1 Consult with key stakeholders to determine areas where potable water could be replaced by alternative sources 3.2 Research alternative sources of potable water 3.3 Complete a cost-benefit analysis on using alternative sources of water 3.4 Research technology to reduce water consumption 3.5 Complete a cost-benefit analysis on implementing new technology to reduce water consumption
4. Recommend water efficient practices	4.1 Rank water efficiencies based on cost-benefit analyses results 4.2 Identify regulatory or organisational requirements in relation to water usage 4.3 Present final recommendations to key 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	1.1-1.3, 2.1, 2.4, 3.2, 3.4, 4.2	• Reviews reported information to identify and evaluate existing processes • Researches alternative strategies in line with organisational goals
Writing	3.2-3.5, 4.3	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	2.5, 3.1, 3.2, 3.4, 4.3	• Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding • Presents information and seeks advice using language appropriate to audience
Numeracy	1.3, 2.1, 2.4, 3.3,	• Analyses numerical information to assess usage and quantities, ratios, time and costs using appropriate

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	3.5, 4.1	tools • Uses calculations to compare and rank alternative processes
Navigate the world of work	4.2	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative requirements and organisation goals
Interact with others	2.5, 3.1, 3.2, 3.4, 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 presenting positive outcomes with a range of stakeholders
Get the work done	1.1-1.3, 2.1-2.5, 3.1-3.5, 4.1, 4.2	• Plans, organises and implements own work activities • Evaluates outcomes of existing processes to identify opportunities for improvement • Uses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, and identifying and evaluating options against organisational goals

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS405 Assess, monitor and reduce water use	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 BSBSUS405 Assess, monitor and reduce water use

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- conduct an investigation of current water usage practices for an organisation, including:
  - water sources
  - how water is used
  - actual and projected water usage
- research and analyse cost benefits of potential improvements to current practices
- report on final recommendations for water efficient 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 the available water sources
- explain how water quality affects what it can be used for
- outline legislative and organisational requirements regarding the access and use of water
- outline new technology for water efficient practices
- outline alternative sources for obtaining potable water
- explain the principles of conducting a cost-benefit analysis.

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 information about legislative requirements

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- relevant workplace documentation
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBSUS406 Identify and apply sustainability rating tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to effectively use rating tools to obtain a sustainability rating.

It applies to individuals who are responsible for implementing sustainability practices, either as their primary duty or as a part of a work role.

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

Unit Sector

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. Prepare to implement sustainability rating tools	1.1 Identify and interpret sustainability rating tools, categories and credits relevant to the organisation 1.2 Collect and organise required documentation for the rating tools and confirm methodology for their use 1.3 Access and interpret organisational and legislative requirements relevant to the use of rating tools 1.4 Identify and confirm requirements for the implementation of the rating tools and obtain approval to proceed

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ELEMENT	PERFORMANCE CRITERIA
2 Implement the sustainability rating tools	2.1 Advise relevant stakeholders of the sustainability rating tools to be used 2.2 Apply the rating tools to gather data about sustainability credentials 2.3 Calculate sustainability rating using all relevant data according to rating tool methodology 2.4 Collate, organise and store data according to organisational and rating tool requirements
3. Evaluate and communicate results	3.1 Evaluate data to identify credits where scores meet, exceed or fall below organisational expectations 3.2 Prepare a report on implementation results, according to internal and external reporting procedures 3.3 Present findings and opportunities for future improvement 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, 2.3, 3.1	• Identifies and interprets complex texts to determine tools aligned with organisational goals and legislative requirements
Writing	1.4, 2.1, 3.2, 3.3	• Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience
Oral Communication	1.4, 2.1, 3.3	• 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	2.2-2.4, 3.1, 3.2	• Includes all relevant data within calculations to provide a complete analysis for implementation and ongoing tracking
Navigate the	1.3, 2.4, 3.2	• Develops, monitors and modifies organisational policies and procedures in accordance with legislative

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world of work		requirements and organisation goals
Interact with others	1.4, 2.1, 3.3	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information • Plays a lead role in presenting outcomes with a range of stakeholders
Get the work done	1.1-1.4, 2.2-2.4, 3.1, 3.2	• Uses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, identifying and evaluating options • Manages implementation and tracks outcomes against organisational goals • Provides relevant communication and identifies opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBSUS406 Identify and apply sustainability rating tools	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 BSBSUS406 Identify and apply sustainability rating tools

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Performance Evidence

Evidence of the ability to:

- conduct research to identify sustainability rating tools and their implementation requirements
- communicate with relevant stakeholders to obtain approval to proceed with implementation and provide ongoing information
- gather data using sustainability rating tools according to specified methodology and organisational requirements
- analyse data to prepare and present final report according to internal and external 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 and describe sustainability rating tools applicable to the organisation
- outline categories and credits used in the sustainability rating tools
- explain methodologies for using sustainability rating tools
- summarise the organisational and rating tool requirements for the storage of data
- explain how sustainability rating tools relate to the organisation's environmental goals and objectives.

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:

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- relevant sustainability rating documentation
- case studies or, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are 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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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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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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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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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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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	work requirements of self and others 1.3 Encourage, acknowledge and act on constructive feedback provided by others in the workgroup
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

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		confirm understanding
Numeracy	1.2	• Interprets information related to timeframes and resource quantities
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	BSBWOR203B 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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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.

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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
- 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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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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
Release 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

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ELEMENT	PERFORMANCE CRITERIA
	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 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

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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
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	BSBWOR404B 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 2	This version first released with BSB Business Services Training Package Version 1.1. Version created to correct mapping table information
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.

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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 documentation including policies and procedures, and benchmarks for work group productivity and performance
- 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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BSBWOR424 Develop a time management plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to develop and implement an integrated time management plan to assist individuals in achieving their business goals and objectives, applying digital technologies where relevant.

It applies to individuals who are required to set their own time schedules for their work. Individuals in this role set priorities and allocate responsibilities for business tasks and functions.

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

Unit Sector

Management and Leadership – 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. Set personal time priorities	1.1 Set personal business goals/objectives 1.2 Identify personal and business accountabilities, listing both recurring tasks, and upcoming one-off tasks 1.3 Select a preferred process/method for prioritising tasks that are aligned to business goals 1.4 Identify any tasks or functions that can be delegated or

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ELEMENT	PERFORMANCE CRITERIA
	outsourced 1.5 Plot the remaining tasks on a scale of importance
2. Collect information on current time usage	2.1 Research methods for logging time spent by task, including new and emerging digital applications 2.2 Use time-logging method to track time spent on daily activities, over a period of seven days 2.3 Assemble data, grouping similar activities and calculating the amount of time spent on each type of activity 2.4 Analyse the amount of time spent of activities of low-importance, compared with activities of high-importance 2.5 Review data and identify opportunities to reallocate time to tasks of higher importance, to increase overall effectiveness
3. Implement time management strategies	3.1 Schedule tasks according to level of importance and aligned with personal productive times 3.2 Employ digital technology solutions where possible to streamline or automate processes 3.3 Select and use tools that help plan time management and schedule tasks, including new and digital technologies 3.4 Incorporate blocks of time for personal tasks and responsibilities to assist with work-life balance 3.5 Set boundaries and communicate personal time to others, working out compromise solutions where necessary

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Assesses own records to identify and analyse time usage
Writing	• Builds records that accurately reflect time usage and personal priorities to allow for accurate assessment • Creates schedules that reflect priorities and enable effective time management
Oral	• Presents new approach in a positive manner, seeking understanding from others

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Communication	• Participates in discussions using listening and questioning to elicit the support of others
Numeracy	• Uses basic numeracy skills to calculate time spent on a range of activities, then creates new schedules aligned to priorities • Measures and monitors progress on an ongoing basis
Interact with others	• Selects and uses appropriate conventions and protocols when communicating with others
Get the work done	• Evaluates records to identify opportunities for improvement • Uses systematic processes to define highest priorities, and activities that can be dropped or delegated • Plans and organises activities and time to focus on priorities and maximise personal effectiveness • Uses technology and tools to improve and automate time management

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWOR424 Develop a time management plan	BSBSMB414 Time management for small business	Updates to title, elements, performance criteria and assessment requirements	Equivalent unit

Links

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

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Assessment Requirements for BSBWOR424 Develop a time management plan

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- establish a representative pattern of current time usage over a specified period, applicable to business context, that identifies high-priority tasks, regular and irregular activities, distractions and time wasters
- demonstrate a systematic approach to improving time management that incorporates:
  - prioritisation of work tasks and responsibilities that most align to business goals
  - personal responsibilities and productive times
  - selection of personal organisation tools or digital technology to plan scheduling of tasks
  - flexibility to accommodate one-off or irregular activities
  - employing digital technologies to streamline or automate existing tasks
- reflect on personal performance after new strategies are in place for a minimum period as relevant to business contexts and identify effectiveness of time management.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of at least three processes or technologies for prioritising tasks and the relative benefits of each
- Key features or a range of technology solutions that can be used for time management
- Key features of common distractions and time wasters for small business owners.
-

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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:

- time management tools and resources
- relevant workplace documentation and resources
- case studies or, where possible, real situations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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BSBWRK311 Develop self-awareness

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

The aim of this unit is to allow learners to improve their self-reliance, self-esteem and confidence by developing task-management skills.

Upon competition of this unit learners will be demonstrate the ability to self-reflect on personal development and acquire knowledge of self through the use of feedback from others to set goals and make plans.

It applies to individuals who need to develop and extend their self-reliance, self-esteem and confidence by developing task-management skill.

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. Recognise attitudes and values	1.1 Identify and record the difference between a personal attitude and value 1.2 Identify the importance of own and other's attitudes and values and document impact within the workplace

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Evaluate and record how attitudes and values can influence self-awareness
2. Identify develop personal strengths	2.1 Identify and record the importance of adaptability and flexibility in line with organisational strategies 2.2 Review personal motivations and their importance for achieving goals and self-awareness 2.3 Review and document the importance of commitment and resilience in the workplace
3. Apply self-awareness in the workplace	3.1 Review personal strengths and weaknesses and their implications on self-awareness 3.2 Create an action plan to develop self-awareness in line with organisational policies and procedures 3.3 Communicate action plan to relevant personnel to gather feedback 3.4 Revise and implement plan with guidance from relevant personnel
4. Develop strategies for on-going improvement	4.1 Evaluate capacity to enhance workplace performance 4.2 Develop strategies to meet opportunities for on-going personal development 4.3 Maintains commitment to monitoring and reflection of self-awareness through continuous review and revision of action plan

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Learning	• Uses questioning as a strategy to expand knowledge • Reflects on existing thinking and current practices to examine self-awareness • Researches activities and articles on relevant topics
Writing	• Creates records on observations, experiences and thoughts • Prepares documents to monitor and reflect on performance
Oral Communication	• Participates in a verbal exchange of observations and elicits the view and opinions of others by listening and questioning

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Interact with others	• Collaborates with others to test, strengthen and explore self-awareness and different ways of thinking

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
BSBWRK311 Develop self-awareness	New unit		New unit

Links

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

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Assessment Requirements for BSBWRK311 Develop self-awareness

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- state and document what an attitude and value is
- state the importance of own and others' values
- state how diverse values and attitudes can influence self-awareness and working environments
- develop and implement action plan
- interact and apply self-awareness with others as suitable for job role
- respond with self-awareness to changing situations.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key differences between attitudes and values
- Key factors contributing to personal effective workplace performance
- Key features of personal motivations and implications for workplace 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 – Leadership field of work and include access to:

- case studies and, where possible, real situations
- interaction with others.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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BSBWRK412 Contribute to personal development

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

The aim of this unit is to allow learners to improve their self-reliance and confidence by demonstrating their self-awareness while participating in one or more tasks, with non-directive supervision.

Upon competition of this unit learners will be able to take responsibility for conscious decision making processes with enhanced self-regulation to contribute to their personal development in the workplace.

It applies to all individuals who require enhanced personal and social awareness skills within the workplace and other situations.

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

Unit Sector

Management and Leadership - Workforce 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 own emotional intelligence	1.1 Identify and reflect on personal motivations, attitudes and values which may or may not impact workplace relationships 1.2 Assess, monitor and record instances of interpersonal biases impacting workplace relationships 1.3 Create a self-regulation management plan appropriate to the workplace to demonstrate use of emotional intelligence 1.4 Seek feedback on plan from relevant stakeholders and adjust as

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ELEMENT	PERFORMANCE CRITERIA
	appropriate
2. Apply emotional intelligence	2.1 Implement self-regulation management plan and monitor impact on own performance and impact on others 2.2 Identify tasks and opportunities which will contribute to the development of emotional intelligence 2.3 Demonstrate positive behaviour as a role model to motivate others to achieve team and /or organisational goals and values 2.4 Develop strategies for reviewing strengths and limitations of own personal development
3. Review and refine personal development	3.1 Identify key areas to sustain health, growth and wellbeing and coping safely and efficiently with the working environment 3.2 Reflect on and document own interpersonal skills, including managing emotions and reactions to on-going work experiences 3.3 Implement the most effective interpersonal style in order to motivate staff in own area to achieve the organisation's values and goals

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Writing	• Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information regarding personal development
Oral Communication	• Establishes understanding through questioning and active listening
Navigate the world of work	• Appreciates the implications of behaviour, language and other organisational responsibilities in carrying out own role
Interact with others	• 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	• Takes responsibility for developing and implementing plans and processes to achieve organisational objectives, seeking feedback and

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	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
BSBWRK412 Contribute to personal development	New unit		New unit

Links

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

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Assessment Requirements for BSBWRK412 Contribute to personal development

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- develop and adapt a self-regulation plan to enhance workplace performance using understanding of emotional intelligence
- role model suitable behaviour in a workplace
- research and plan opportunities for own personal development
- identify and record areas for further development in own behaviour in relation to others
- interact and apply self-awareness with others as suitable to and within job role
- monitoring progress of own interpersonal skills.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key differences between positive and negative workplace behaviour
- Key requirements of interpersonal skill concepts
- Key features to the development of attitudes and values
- Key features of personal motivations and implications for workplace 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 – Leadership field of work and include access to:

- case studies and, where possible, real situations
- interaction with others.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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BSBWRK520 Manage employee relations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to manage 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 in accordance with organisational objectives 1.2 Analyse existing employee relations performance in relation to workforce objectives 1.3 Evaluate options in terms of cost-benefit, risk-analysis and

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ELEMENT	PERFORMANCE CRITERIA
	current legislative requirements 1.4 Work with relevant internal stakeholders 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 Document procedures for addressing grievances and conflict 2.5 Identify and communicate key 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 Develop and deliver training to 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 Evaluate documentation and other information sources to clarify issues in dispute and ensure completeness, balance and relevance 3.4 Obtain expert or specialist advice and/or refer to precedents, if required 3.5 Determine desired negotiation outcomes, negotiation strategy and negotiation timeframes 3.6 Advocate the organisation’s position in negotiation with the view to reaching a resolution that aligns to organisational objectives 3.7 Document, and if necessary certify, the agreed outcomes with the relevant jurisdiction 3.8 Take remedial action where groups or individuals fail to abide by agreements

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Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	• Interprets, critically analyses and applies appropriate strategies to construct meaning from complex texts
Writing	• Displays knowledge of required structure and layout, employing broad vocabulary, grammatical structure and conventions appropriate to purpose and audience
Oral communication	• Conveys information using language and non-verbal features appropriate to the audience • Employs listening and questioning techniques to clarify and confirm understanding
Numeracy	• Extracts and evaluates the mathematical information embedded in a range of tasks and texts
Navigate the world of work	• 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	• 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	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses analytical techniques to identify issues and generate possible solutions, seeking input from others as required, before making decisions or implementing solutions • Draws on the diverse perspectives of others to gain insights into current practices and opportunities for change

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBWRK520	BSBWRK510 Manage	Updates to elements,	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
Manage employee relations	employee relations	performance criteria and assessment requirements	

Links

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

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Assessment Requirements for BSBWRK520 Manage employee relations

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- 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

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- Key features of relevant industrial relations legislation or regulations
- Key features of enterprise and workplace bargaining processes
- Key features of relevant entities in the current Australian industrial relations system, including courts and tribunals, trade unions and employer bodies
- Key sources of expert industrial relations advice
- Key features of relevant organisational policies and procedures
- Key features of organisational 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 – 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 of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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

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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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CHCADV001 Facilitate the interests and rights of clients

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged CHCAD401 /CHCAD402. Significant changes to performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

Application

This unit describes the skills and knowledge required to assist clients to identify their rights, voice their needs and concerns and realise their interests, rights and needs.

This unit applies to workers of all levels in a range of health or community services settings who provide services using a human rights based approach and have direct interaction with clients.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria specify the performance needed to demonstrate achievement of the element*
1. Facilitate the realisation of client interests, rights and needs	1.1 Discuss the rights and responsibilities of all parties with client 1.2 Provide client with researched, relevant and timely information on their rights and responsibilities 1.3 Assist clients to identify their own interests, rights, needs, choices and responsibilities

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria specify the performance needed to demonstrate achievement of the element*
	1.4 Identify when rights are infringed or not being met
	1.5 Provide client with information on available options for meeting their rights and needs and assist them to identify their preferred option
2. Advocate in accordance with client preferences and requests to optimise client outcomes	2.1 Undertake an assessment to identify client's ability to advocate for self
	2.2 Initiate, negotiate and implement relevant strategies for addressing client rights and needs in collaboration with the client
	2.3 Identify potential barriers as well as resources
	2.4 Identify and contact the most appropriate individuals and/or organisations and represent the client to optimise outcomes for the client
	2.5 Ensure information is kept in confidence unless authorisation is given to release it
3. Provide ongoing support to clients	3.1 Support and encourage clients to exercise their rights and personal preferences without compromising their safety and that of others
	3.2 Consult with supervisor, other support workers and the service about interests, rights and needs of clients in a way that upholds their rights and supports their reasonable expectations
	3.3 Identify situations of risk or potential risk and refer appropriately
	3.4 Apply work practices to minimise potential for harm to clients, self and others
	3.5 Conduct all activities in accordance with legal, organisation and duty of care requirements
4. Support clients making a complaint	4.1 Discuss organisation and legal complaints mechanism and ensure client is aware of rights and responsibilities

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria specify the performance needed to demonstrate achievement of the element*
	4.2 Assist client in lodging a complaint
	4.3 Monitor process and provide ongoing support and information to client
5. Review progress	5.1 Discuss progress and outcomes with the client and collaborate on further action as necessary
	5.2 Ensure follow up and links to other services as required and in accordance with client preferences
	5.3 Obtain feedback and identify opportunities for improvement to own work and action as appropriate

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) *that are essential to performance.*

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCADV001 Facilitate the interests and rights of clients

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged CHCAD401 /CHCAD402. Significant changes to performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

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 demonstrated evidence that the candidate has:

- Worked in collaboration with 1 client to identify their interests, needs and rights
- Advocated on behalf of 1 client to achieve a specific outcome
- Supported 1 client throughout an organisational or legal complaints process

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 the task and manage contingencies in the context of the work role. This includes knowledge of:

- *Universal Declaration of Human Rights*
- relationship between human needs and human rights
- human rights frameworks, approaches, instruments
- legal and ethical considerations (international, national, state/territory, local) related to facilitation of client rights and interests and how these impact individual workers:
  - duty of care
  - human rights
  - mandatory reporting
  - discrimination
  - privacy, confidentiality and disclosure

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  - informed consent
  - organisation and legal complaints processes
  - rights and responsibilities of clients, workers and organisations
- common risks to client safety and wellbeing
- relevance of child protection across all health and community services contexts, including duty of care when child is not the client, indicators of risk and adult disclosure
- actions that constitute discrimination and techniques for addressing it
- types of community resources, networks and referral options relevant to the nature of client service
- potential conflict between client needs and organisation requirements
- differences between negotiation, advocacy, mediation
- negotiation, advocacy, mediation techniques for the facilitation of client rights
- empowerment and disempowerment

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. Where simulation is used, it must reflect real working conditions by modelling industry operating conditions and contingencies, as well as, using suitable facilities, equipment and resources.

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCCCS007 Develop and implement service programs

Modification History

Release	Comments
Release 2	This version was released in *CHC Community Services Training Package release 3.0.* Amended modification history and mapping. Equivalent outcome.
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant change to the elements and performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

Application

This unit describes the skills and knowledge required to engage consumers, analyse service needs of particular groups and develop programs and services to meet those needs.

This unit applies to workers coordinating or managing teams and operations in varied service delivery contexts.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Engage consumers in the analysis of service needs	1.1 Develop a plan for consumer participation and engagement in decisions about service provision 1.2 Investigate the needs of individuals as the basis for service provision in line with consumer participation and

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
	engagement plan
	1.3 Recognise processes and communications that may be a barrier to consumer participation and develop mechanisms to overcome these
	1.4 Interact and consult with people accessing the service to monitor changing needs so they can be addressed
	1.5 Consult and collaborate with other services and networks to address multi-faceted needs of individuals and client groups
	1.6 Evaluate broader organisation context and its impact on service delivery
2. Develop programs	2.1 Facilitate input to program development from internal and external stakeholders
	2.2 Engage people accessing programs in management processes and develop formal arrangements as required
	2.3 Incorporate consideration of individual differences, rights, needs and preferences in the planning processes
	2.4 Integrate both internal and external services as required
	2.5 Determine financial, human and physical resource requirements
	2.6 Develop supporting systems and procedures
	2.7 Develop and integrate service evaluation methods, including mechanisms for feedback from people accessing service programs
	2.8 Document program identifying priorities, timelines and responsibilities
3. Implement and monitor programs	3.1 Communicate roles and responsibilities to relevant stakeholders
	3.2 Facilitate provision of training to support implementation
	3.3 Monitor service delivery against agreed objectives

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
	and budgetary frameworks
	3.4 Make user interactions and feedback an integral part of ongoing monitoring
	3.5 Identify and address problems in addressing the needs of service users in accordance with organisation procedures
	3.6 Maintain relevant program and service delivery documentation
4. Evaluate programs	4.1 Assess capacity of programs to meet objectives
	4.2 Seek and evaluate feedback from those using the service and other stakeholders
	4.3 Modify programs as needed to meet changing requirements within policy and budgetary frameworks

Foundation Skills

The Foundation Skills describe 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=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCCCS007 Develop and implement service programs

Modification History

Release	Comments
Release 2	This version was released in *CHC Community Services Training Package release 3.0*. Amended modification history and mapping. Equivalent outcome.
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant change to the elements and performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

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 demonstrated evidence that the candidate has:

- developed, implemented and evaluated at least 1 community sector service program

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:

- program planning principles and processes, including:
  - program design
  - program resourcing
  - implementation systems and procedures
  - feedback and complaints procedures
  - evaluation and continuous improvement
  - accountability and governance
  - funding framework, including not-for-profit, government funding

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- supports needed for effective consumer participation at all levels of program planning
- requirements of specific service user groups and individuals, including:
  - diverse and multi-faceted needs and issues service user participation opportunities and barriers
  - opportunities for collaboration and service partnerships
  - risk, regulatory and sustainability considerations
  - standards, codes and legislation compliance

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. The following conditions must be met for this unit:

- use of suitable facilities, equipment and resources, including organisation policies and procedures
- modelling typical workplace conditions and contingencies, including interactions with users of the service and co-workers from a range of diverse backgrounds

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCDIV001 Work with diverse people

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged HLTHIR403C/CHCCS405C. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency.

Application

This unit describes the skills and knowledge required to work respectfully with people from diverse social and cultural groups and situations, including Aboriginal and/or Torres Strait Islander people.

This unit applies to all workers.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element*
1. Reflect on own perspectives	1.1 Identify and reflect on own social and cultural perspectives and biases 1.2 Work with awareness of own limitations in self and social awareness 1.3 Use reflection to support own ability to work inclusively and with understanding of others

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element*
	1.4 Identify and act on ways to improve own self and social awareness
2. Appreciate diversity and inclusiveness, and their benefits	2.1 Value and respect diversity and inclusiveness across all areas of work
	2.2 Contribute to the development of work place and professional relationships based on appreciation of diversity and inclusiveness
	2.3 Use work practices that make environments safe for all
3. Communicate with people from diverse backgrounds and situations	3.1 Show respect for diversity in communication with all people
	3.2 Use verbal and non-verbal communication constructively to establish, develop and maintain effective relationships, mutual trust and confidence
	3.3 Where a language barrier exists, use effective strategies to communicate in the most efficient way possible
	3.4 Seek assistance from interpreters or other persons according to communication needs
4. Promote understanding across diverse groups	4.1 Identify issues that may cause communication misunderstandings or other difficulties
	4.2 Where difficulties or misunderstandings occur, consider the impact of social and cultural diversity
	4.3 Make an effort to sensitively resolve differences, taking account of diversity considerations
	4.4 Address any difficulties with appropriate people and seek assistance when required

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Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCDIV001 Work with diverse people

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged HLTHIR403C/CHCCS405C. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency.

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:

- undertaken a structured process to reflect on own perspectives on diversity
- recognised and respected the needs of people from diverse social and cultural backgrounds in at least 3 different situations:
  - selected and used appropriate verbal and non verbal communication
  - recognised situations where misunderstandings may arise from diversity and formed appropriate responses

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:

- concepts of cultural awareness, cultural safety and cultural competence and how these impact different work roles
- concepts and definitions of diversity
- own culture and the community attitudes, language, policies and structures of that culture and how they impact on different people and groups
- features of diversity in Australia and how this impacts different areas of work and life:
  - political
  - social
  - economic

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    - cultural
- legal and ethical considerations (international, national, state/territory, local) for working with diversity, how these impact individual workers, and the consequences of breaches:
    - discrimination:
        - age
        - disability
        - racial
        - sex
    - human rights:
        - *Universal declaration of human rights*
        - relationship between human needs and human rights
        - frameworks, approaches and instruments used in the workplace
    - rights and responsibilities of workers, employers and clients, including appropriate action when rights are being infringed or responsibilities not being carried out
- key areas of diversity and their characteristics, including:
    - culture, race, ethnicity
    - disability
    - religious or spiritual beliefs
    - gender, including transgender
    - intersex
    - generational
    - sexual orientation/sexual identity - lesbian, gay, bisexual, heterosexual
- key aspects, and the diversity, of Australia's Aboriginal and/or Torres Strait Islander cultures, including:
    - social, political and economic issues affecting Aboriginal and/or Torres Strait Islander people
    - own culture, western systems and structures and how these impact on Aboriginal and/or Torres Strait Islander people and their engagement with services
- potential needs of marginalised groups, including:
    - protective factors
    - physical, mental and emotional health issues/care needs
    - consideration of impacts of discrimination, trauma, exclusion and negative attitudes
- resources that support individuals and organisations to embrace and respond to diversity
    - language and cultural interpreters
    - imagery
- influences and changing practices in Australia and their impact on the diverse communities that make up Australian society
- impact of diversity practices and experiences on personal behaviour, interpersonal relationships, perception and social expectations of others

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Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. Where simulation is used, it must reflect real working conditions by modelling industry operating conditions and contingencies, as well as, using suitable facilities, equipment and resources.

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCINM001 Meet statutory and organisation information requirements

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

Application

This unit describes the skills and knowledge required to ensure effectiveness and efficiency of the organisation's information system.

This unit applies to work in a range of health or community service contexts where work may be carried out by senior workers working autonomously within broad guidelines.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria specify the level of performance needed to demonstrate achievement of the element*
1. Identify and address information requirements	1.1 Use appropriate mechanisms to identify organisation and statutory information requirements
	1.2 Identify gaps or inadequacies in the organisation's information systems
	1.3 Analyse any substantial breakdowns in methods of recording, storing and accessing information for cause and effect, and take corrective action
	1.4 Collect, analyse and prepare data on information

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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*
	needs in ways to inform decision-making
2. Review options for information management	2.1 Identify and periodically evaluate sources of information
	2.2 Identify, evaluate and prepare options for the development of information systems in consultation with users
	2.3 Identify, calculate and evaluate financial and technological resources required for systems
3. Establish and manage systems to record and store information	3.1 Develop, implement and document systems that meet organisation and statutory information requirements for recording, storing and accessing information
	3.2 Implement strategies to address any gaps in meeting current information requirements in consultation with stakeholders
4. Develop staff and resources	4.1 Analyse staff training needs in relation to information systems and in accordance with legislative and organisation requirements
	4.2 Organise training or retraining in accordance with training needs analysis
	4.3 Support and supervise the development of information and educational resources
	4.4 Develop content and format guidelines in consultation with stakeholders to guide production of resources
	4.5 Recruit appropriate expertise to develop information and training resources
5. Evaluate and maintain quality information systems	5.1 Routinely evaluate adequacy of information systems used to record and store information for effectiveness, efficiency, security and integrity and introduce new methods as necessary

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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*
	5.2 Monitor validity, currency and usefulness of information and take appropriate actions for disposal or storage
	5.3 Monitor ongoing development of information systems and training resources in consultation with users
	5.4 Implement strategies to continuously improve effectiveness of information systems and resources

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCINM001 Meet statutory and organisation information requirements

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to performance criteria. New evidence requirements for assessment including volume and frequency requirements. Significant changes to knowledge evidence.

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:

- established and managed 1 organisation or departmental information system:
  - assessed and analysed information requirements in consultation with stakeholders
  - reviewed options for system, including financial and technological resource requirements
  - designed and documented system
  - implemented processes to support information management system and development of information resources
  - evaluated information management system against objectives

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:

- workload analysis models and systems
- relevant policy and procedures and work systems
- systems analysis models and theories
- legal and ethical considerations relating to organisation and statutory information requirements
- range of current and emerging information technology relevant to addressing organisation information requirements

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- consultation processes and techniques
- training needs analysis
- communication dissemination models

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. The following conditions must be met for this unit:

- use of suitable facilities, equipment and resources, including:
  - current information and communication technology (ICT) systems
  - statutory requirements
- modelling of industry operating conditions

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCLLN001 Respond to client language, literacy and numeracy needs

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency.

Application

This unit describes the skills and knowledge required to identify situations where client language, literacy and numeracy (LLN) skills may be impeding access to services, to adjust service delivery, and to refer appropriately to improve client outcomes.

The unit does not provide workers with the skills and knowledge to identify LLN skill levels or to actively intervene in developing a client's LLN skills.

This unit applies to individuals who may be making individual client assessments or managing caseloads as part of their work role.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Elements define the essential outcomes	*Performance criteria describe the performance required to demonstrate achievement of the element*
1. Establish client's LLN needs	1.1 Identify signs that the client may have LLN needs

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance required to demonstrate achievement of the element*
	1.2 Review the scope of LLN skill requirements needed to effectively access services
	1.3 Identify gaps between the client's LLN skills and those required to effectively access services
	1.4 Determine the degree to which other issues may impact on the client
2. Determine strategies to address LLN needs	2.1 Collaborate with client to agree areas of LLN need and how to respond
	2.2 Determine ways in which service delivery can take account of the client's LLN needs
	2.3 Prioritise areas for immediate or longer-term action based on scope of the client's needs
3. Implement strategies to address LLN needs	3.1 Adjust service delivery approaches that respond to LLN need, including use of appropriate tools and communication strategies
	3.2 Provide the client with accurate and current information about LLN support services
	3.3 Record agreed LLN needs and the strategies used, and report in line with the client and organisation requirements
	3.4 Monitor the client and provide ongoing support and encouragement where appropriate

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

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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=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCLLN001 Respond to client language, literacy and numeracy needs

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency.

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:

- responded to the needs of at least 3 different people with LLN needs

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:

- indicators of LLN needs, and methods for clarifying them with the client
- methods for identifying the impact of other service-related issues on the client's LLN needs
- LLN information and referral or support services for a range of LLN needs and clients
- recording and reporting requirements

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. Where simulation is used, it must reflect real working conditions by modelling industry operating conditions and contingencies, as well as, using suitable facilities, equipment and resources.

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Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCPRP001 Develop and maintain networks and collaborative partnerships

Modification History

Release	Comments
Release 2	This version was released in *CHC Community Services Training Package release 3.0*. Correction of modification history and mapping - CHCNET301D and CHCNET404B removed
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged CHCNET402B/ CHCNET501C/ CHCNET503D. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency. Significant change to knowledge evidence.

Application

This unit describes the skills and knowledge required to identify networking and collaboration needs and develop formal and informal partnerships to enhance service delivery and improve professional practice.

This unit applies to work in all industry sectors, and to individuals who take pro-active responsibility for improving collaboration between workers and organisations.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element*

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ELEMENT	PERFORMANCE CRITERIA
1. Identify networking and collaboration needs and opportunities	1.1 Evaluate the ways in which individual and organisation performance may be improved through collaboration 1.2 Identify and prioritise organisation and individual needs 1.3 Identify gaps in networks and collaborative practice and identify required action to fill the gap
2. Develop collaboration strategies	2.1 Gather and review information about relevant services, organisations and key people 2.2 Pro-actively initiate relationships with other inter and intra sectoral professionals and organisations 2.3 Share information and resources, where possible, with other organisations to overcome duplication in service delivery 2.4 Maintain currency and accessibility of information 2.5 Define and document the type and level of collaboration, and negotiate with the relevant people
3. Work collaboratively	3.1 Identify opportunities that meet client, personal and organisation goals 3.2 Plan and implement integrated projects and service delivery 3.3 Liaise with staff from relevant organisations on a formal and informal basis
4. Represent the organisation	4.1 Promote a positive image of the organisation at available opportunities 4.2 Communicate issues, policies and practices of the organisation in appropriate formats 4.3 Implement confidentiality measures that protect client, organisation and network
5. Maintain and enhance networks and collaborative	5.1 Maintain networks and other work relationships to provide identifiable benefits for clients and the

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ELEMENT	PERFORMANCE CRITERIA
partnerships	organisation
	5.2 Improve and maintain networks and collaborative partnerships
	5.3 Monitor benefits to worker, organisation and client group in ongoing participation
	5.4 Evaluate strengths and weaknesses of collaborations and make recommendations for action

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCPRP001 Develop and maintain networks and collaborative partnerships

Modification History

Release	Comments
Release 2	This version was released in *CHC Community Services Training Package release 3.0*. Correction of modification history and mapping - CHCNET301D and CHCNET404B removed.
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Merged CHCNET402B/ CHCNET501C/ CHCNET503D. Significant changes to the elements and performance criteria. New evidence requirements for assessment, including volume and frequency. Significant change to knowledge evidence.

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:

- developed strategies for networking and collaboration for at least 1 organisation
- worked collaboratively with external individuals or groups in at least 3 different service delivery situations

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:

- legal and ethical considerations for collaborative practice, including:
  - copyright and intellectual property
  - privacy, confidentiality and disclosure
- principles of networking and collaboration
- different types of networks and collaboration:
  - organisational
  - individual

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  - virtual
  - formal/informal
- benefits of networking and collaboration:
  - for clients
  - for the organisation
  - for the worker
- values, limitations and dynamics of networks and collaborative partnerships
- industry structure and interrelationships between different organisations, both public and private
- established networks in relevant area of work:
  - structure
  - key stakeholders
  - vision and purpose
  - opportunities for participation

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. The following conditions must be met for this unit:

- use of suitable facilities, equipment and resources, including information relating to peak bodies, network groups and web based network services
- modelling of industry operating conditions, including presence of situations that allow interactions with individuals and organisations

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CHCVOL003 Recruit, induct and support volunteers

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to performance criteria New evidence requirements for assessment including volume and frequency requirements Significant changes to knowledge evidence

Application

This unit describes the skills and knowledge required to recruit, orientate, develop and support volunteer workers in an agency, service or program. Workers at this level will be responsible for the ongoing coordination and supervision of volunteers who may be working in a range of contexts.

This unit applies to a range of sectors.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Plan and develop a volunteer recruitment program	1.1 Develop and implement processes and procedures to support the identification of volunteer roles 1.2 Apply models of volunteering to develop volunteering roles within the organisation 1.3 Plan and develop recruitment, selection and induction policies and procedure

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ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
2. Select and induct volunteers	2.1 Develop appropriate advertising strategies ensuing compliance with organisation policy and legal requirements 2.2 Undertake appropriate screening, interviewing and selection processes 2.3 Develop and implement volunteer induction program
3. Develop and implement volunteer support systems	3.1 Develop and implement training appropriate for volunteer roles 3.2 Establish and maintain regular communication with volunteers 3.3 Regularly review roles and performance and provide feedback to the volunteer 3.4 Review recruitment, induction and support systems and identify areas for continuous improvement

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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Assessment Requirements for CHCVOL003 Recruit, induct and support volunteers

Modification History

Release	Comments
Release 1	This version was released in *CHC Community Services Training Package release 2.0* and meets the requirements of the 2012 Standards for Training Packages. Significant changes to performance criteria New evidence requirements for assessment including volume and frequency requirements Significant changes to knowledge evidence

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:

- planned and implemented all aspects of the recruitment of 2 volunteers
- developed and implemented 1 induction program for volunteers, that included:
  - organisation purpose and services
  - role of volunteers in the organisation
  - insurance
  - rights & responsibilities of all parties including work health and safety (WHS)
  - organisation structure and lines of communication and authority
  - expenses and reimbursements processes
  - relevant policies and procedures and codes of conduct
- conducted a performance review for 1 volunteer

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:

- relevant legislation and public policies relating to the employment of unpaid workers
- rights and responsibilities of both organisation and volunteer
- implications of differences in attitudes and values in working in the organisation

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- *Universal declaration on volunteering* and current national volunteering codes and standards
- definitions of volunteering
- paid versus unpaid role responsibilities and the delineation of these roles
- structure of volunteer sector including support and recruitment agencies
- role of government and government bodies in volunteering
- motivations of volunteers, what can de-motivate volunteers and how volunteer motivation changes over time
- different models of volunteering taken from an organisation perspective, including the involvement of volunteers as service providers, fundraisers, corporate volunteering, activist and in community development
- range of diverse sectors and roles where volunteers are involved
- screening processes, including police checks, interviews, application forms, referee checks and meetings
- current trends and issues in volunteering
- engagement strategies for volunteering
- performance appraisal methods and techniques
- recognition and rewards for volunteers

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. Where simulation is used, it must reflect real working conditions by modelling industry operating conditions and contingencies, as well as, using suitable facilities, equipment and resources.

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53

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CPCCWHS1001 Prepare to work safely in the construction industry

Modification History

Release	Comment
Version 1	Replaces superseded equivalent CPCCOHS1001A Work safely in the construction industry.

Application

This unit of competency specifies the mandatory work health and safety training required prior to undertaking construction work. The unit requires the person to demonstrate personal awareness and knowledge of health and safety legislative requirements in order to work safely and prevent injury or harm to self and others. It covers identifying and orally reporting common construction hazards, understanding basic risk control measures, and identifying procedures for responding to potential incidents and emergencies. It also covers correctly selecting and fitting common personal protective equipment (PPE) used for construction work.

This unit meets the general construction induction training requirements of:

- Part 1.1 Definitions and Part 6.5 of the Model Work Health and Safety Regulations;
- Division 11 of Part 3 of the Occupational Safety and Health Regulations 1996 for Western Australia; and
- Division 3 of Part 5.1 of the Occupational Health and Safety Regulations 2007 for Victoria.

It is expected that site-specific induction training will be conducted prior to conducting construction work.

Licensing, legislative, regulatory or certification requirements apply to this unit. Relevant work health and safety state and territory regulatory authorities should be consulted to confirm jurisdictional requirements.

Pre-requisite Unit

Nil

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Unit Sector

Construction

Elements and Performance Criteria

Elements describe the essential outcomes.		Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions.
1.	Identify health and safety legislative requirements of construction work.	1.1. Basic roles, responsibilities and rights of duty holders are identified and explained according to ***jurisdictional health and safety legislative requirements***.
		1.2. Duty of care requirements are identified.
		1.3. Construction safe work practices are identified and explained.
2.	Identify construction hazards and risk control measures.	2.1. Basic principles of risk management are identified.
		2.2. Construction hazards are identified and discussed.
		2.3. Purpose and use of PPE are identified and demonstrated.
		2.4. Measures for controlling hazards are identified.
3.	Identify health and safety communication and reporting processes.	3.1. Health and safety documents are identified and discussed.
		3.2. Roles of designated health and safety personnel are identified and explained.
		3.3. Safety signs and symbols are identified and explained.
		3.4. Procedures for reporting hazards, incidents and injuries are identified.
4.	Identify incident and emergency response	4.1. Procedures for responding to incidents and emergencies are identified and explained.
		4.2. Procedures for accessing first aid are identified.

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procedures.	4.3.	Types and purpose of fire safety equipment are identified and discussed.

Foundation Skills

This section describes the language, literacy, numeracy and employment skills essential to performance in this unit but not explicit in the performance criteria.

Skill	Performance feature
Numeracy skills to:	• locate and recognise numbers commonly used in safety signs.
Oral communication skills to:	• ask questions to clarify instructions • listen to instructions to identify key safety information • tell another person about a construction problem or hazard.
Reading skills to:	• follow simple pictorial safety instructions • follow simple safety instructions that are written in English.
Problem-solving skills to:	• select risk control measures.

Range of Conditions

This section specifies work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included. Bold italicised wording, if used in the performance criteria, is detailed below.

Jurisdictional health and safety legislative requirements must include at least one of the following state and territory Acts or their equivalent:	• Australian Capital Territory: Work Health and Safety Act 2011 • New South Wales: Work Health and Safety Act 2011 • Northern Territory: Work Health and Safety (National Uniform Legislation) Act 2011 • Queensland: Work Health and Safety Act 2011 • South Australia: Work Health and Safety Act 2012 • Tasmania: Work Health and Safety Act 2012 • Victoria: Occupational Health and Safety Act 2004 • Western Australia: Occupational Safety and Health Act 1984.

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Unit Mapping Information

Supersedes and is equivalent to CPCCOHS1001A Work safely in the construction industry

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=7e15fa6a-68b8-4097-b099-030a5569b1ad

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Assessment Requirements for CPCCWHS1001 Prepare to work safely in the construction industry

Modification History

Release	Comment
Version 1	Replaces superseded equivalent CPCCOHS1001A Work safely in the construction industry.

Performance Evidence

A person demonstrating competency in this unit must satisfy the requirements of the elements, performance criteria, foundation skills, and range of conditions of this unit, in addition to the specific performance and knowledge evidence described below.

The person must:

- identify and orally report two construction hazards
- orally explain how risk could be reduced or removed in relation to those two hazards
- select appropriate personal protective equipment (PPE) to control the risk
- orally explain basic procedures for responding to incidents and emergencies, including types and purpose of the following fire safety equipment:
  - fire blankets
  - fire extinguishers, including water, carbon dioxide, powder and foam
  - hose reels and mains
- identify and orally explain the meaning of required safety signs and symbols
- orally explain the purpose of job safety analyses (JSAs), safe work method statements (SWMS) and safety data sheets (SDS)
- orally explain the roles of the following designated health and safety personnel:
  - first aid officers
  - work health and safety representatives
  - work health and safety committee members
  - supervisors.

The person must also demonstrate correctly fitting to themselves the PPE listed below:

- eye protection
- hearing protection
- hard hat

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- high visibility retro reflective vest.

Knowledge Evidence

A person must demonstrate knowledge of:

- basic duty of care, and the roles, rights and responsibilities of business owners and workers in relation to working safely while undertaking construction work
- basic meaning of the terms ‘hazard’ and ‘risk’
- basic principles of risk management, including the following five steps in order:
  - identify hazard
  - assess risk
  - consult and report
  - control hazard
  - review
- basic procedures for accessing first aid
- construction hazards, including those relating to:
  - asbestos
  - confined spaces
  - electrical: power lines, cords and equipment
  - excavations and trenches, including underground services
  - dust
  - falling objects
  - hazardous substances and dangerous goods
  - hot and cold work environments
  - manual handling
  - noise
  - plant and equipment operation
  - traffic and mobile plant
  - unplanned collapse
  - ultraviolet radiation
  - working at heights, including scaffolding
- construction work that requires a high risk work licence
- types, purpose and use of PPE used in construction, as specified in the performance evidence, and including safety footwear, harnesses and respiratory protection, and ultraviolet (UV) protective clothing and sunscreen
- construction emergencies, including:
  - chemical spill
  - fire
  - injury to personnel
  - structural collapse
  - toxic or flammable vapour emission

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    - vehicle or mobile plant accident
- construction incidents, including:
    - incidents resulting in personal injury or damage to property
    - near misses or dangerous occurrences that do not cause injury but may pose an immediate and significant risk to persons or property, and need to be reported so that action can be taken to prevent recurrence
- safe work practices that should be followed in construction work, including:
    - accessing and using site amenities for drinking water, hand washing and toilets
    - following safety procedures when performing work tasks and using equipment
    - identifying and reporting hazards, incidents and injuries in the workplace
    - keeping the work area clean, tidy and free from debris
    - not using or being affected by drugs and/or alcohol while at work
    - preventing bullying and harassment in the workplace
    - selecting and using required PPE
    - smoking only in designated areas
    - storing and removing waste and debris in designated areas
- meanings and symbols associated with construction safety signs, symbols and tags, including:
    - emergency information signs: exits, emergency equipment and first aid
    - fire signs: location of fire alarms and firefighting equipment
    - hazard signs and symbols: danger and warning
    - regulatory signs and symbols: prohibition, mandatory and limitation or restriction
    - safety and lockout tags: danger and out-of-service tags.

Assessment Conditions

The following must be present and available to learners during assessment activities:

- equipment:
    - all of the PPE listed in the performance evidence
- specifications:
    - state or territory Act relevant to the location of the learner, as specified in the range of conditions.

The assessment of performance evidence must be done by direct observation of the learner by an assessor, either by an assessor observing the learner physically and/or by an assessor observing the learner via audio and visual media in real time.

Assessor requirements

As a minimum, assessors must satisfy the assessor requirements in the Standards for Registered Training Organisations (RTOs) current at the time of assessment.

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Assessors must hold the unit *CPCCOHS2001A Apply OHS requirements, policies and procedures in the construction industry*, or its successor.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=7e15fa6a-68b8-4097-b099-030a5569b1ad

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CPPDSM4047 Implement and monitor procurement process

Modification History

Release 1.

Replaces superseded equivalent CPPDSM4047A Implement and monitor procurement process.

This version first released with CPP Property Services Training Package Version 5.

Application

This unit of competency specifies the outcomes required to implement and monitor purchasing processes for goods and services. It requires the ability to follow procurement procedures, determine and arrange appropriate suppliers, and check that final procurement meets client objectives.

The unit supports workers in the property industry who are involved in implementing and monitoring purchasing processes for goods and services. It applies to real estate agents, property managers, strata managers and facility managers.

Licensing, legislative, regulatory or certification requirements apply to this unit in some States and Territories. Relevant state and territory regulatory authorities should be consulted to confirm those requirements.

Pre-requisite Unit

Nil

Competency Field

Strata community management

Unit Sector

Property services

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Elements and Performance Criteria

Elements describe the essential outcomes.		Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions.
1.	Determine procurement requirements.	1.1. Procurement requirements and objectives are identified. 1.2. Information on procurement requirements is gathered and reviewed to determine appropriate ***procurement process*** and timelines. 1.3. Factors likely to affect procurement objectives are identified. 1.4. Own limitations of authority are identified and appropriate approvals gained as required.
2.	Monitor procurement process.	2.1. Procurement process is systematically monitored and variations to supply are identified. 2.2. Effective communication channels are used to ensure accurate communication flow with suppliers. 2.3. Expenditure and resource usage are monitored to ensure procurement objectives are achieved within budget parameters. 2.4. Reliable methods of monitoring procurement are used to ensure efficient use of time and resources.
3.	Finalise procurement process.	3.1. Purchase of goods and services is completed within designated timeframes. 3.2. Inspection is arranged to confirm procurement meets required quality standards and procurement objectives. 3.3. Defects or variances to procurement objectives are identified and prompt remedial action is taken. 3.4. Procurement system and records, and reports on procurement process, are maintained using business equipment and technology.

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Foundation Skills

This section describes the language, literacy, numeracy and employment skills essential to performance in this unit but not explicit in the performance criteria.

Skill	Performance feature
Learning skills to:	• maintain current knowledge of procurement procedures.
Oral communication skills to:	• discuss and confirm procurement arrangements with suppliers.
Reading skills to:	• interpret procurement documentation.
Writing skills to:	• complete standards forms and prepare complex written reports on defects or variations to goods or services ordered through procurement process.

Range of Conditions

This section specifies work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included. Bold italicised wording, if used in the performance criteria, is detailed below.

Procurement process must include at least two of the following:	• open tendering • request for proposal • request for quotation • restricted tendering • single source • two stage tendering.

Unit Mapping Information

CPPDSM4047A Implement and monitor procurement process

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b

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Assessment Requirements for CPPDSM4047 Implement and monitor procurement process

Modification History

Release 1.

Replaces superseded equivalent CPPDSM4047A Implement and monitor procurement process.

This version first released with CPP Property Services Training Package Version 5.

Performance Evidence

A person demonstrating competency in this unit must satisfy all of the elements, performance criteria, foundation skills and range of conditions of this unit.

The person must also implement and monitor purchasing processes for two different goods or services relating to managing a building or facility.

Each product or service must be procured using a different procurement method selected from the following:

- open tendering
- request for proposal
- request for quotation
- restricted tendering
- single source
- two-stage tendering.

In doing the above, the person must:

- review procurement objectives and relevant information to determine procurement processes, and source appropriate authority or delegations for procurement
- finalise procurement process within agreed timeframes, using business equipment and technology to maintain records and reports
- apply knowledge of organisation’s practices, ethical standards, and legislative requirements associated with implementing and monitoring purchasing processes for goods and services
- use effective oral and written communication to effectively monitor the implementation of the procurement process against budget parameters.

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Knowledge Evidence

A person demonstrating competency in this unit must demonstrate knowledge of:

- benefits and risks associated with, and procedures for, the following procurement processes:
  - open tendering
  - request for proposal
  - request for quotation
  - restricted tendering
  - single source
  - two-stage tendering
- best practice procurement principles
- implications of warranties, guarantees and exclusions relating to goods and services
- key principles of procurement, including:
  - accountability and recording
  - ethics and fair dealing
  - open and effective competition
  - planning and professionalism
  - value for money
- limitations of own work role, responsibilities and professional abilities
- key requirements of federal, state or territory legislation and local government regulations relating to:
  - anti-discrimination
  - consumer protection
  - environmental issues
  - equal employment opportunity (EEO)
  - financial probity
  - franchise and business structures
  - industrial relations
  - work health and safety (WHS).

Assessment Conditions

The following must be present and available to learners during assessment activities:

- equipment:
  - computer system with internet, email and printing facilities
- specifications:
  - details of goods or services to be procured
  - organisational procurement policies and procedures
  - organisational procurement process checklist
  - guides on procurement processes and procedures

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- relationship with team members and supervisor:
  - member of a work team in a property industry context.

Assessor requirements

As a minimum, assessors must satisfy the assessor requirements in the *Standards for Registered Training Organisations* (RTOs) current at the time of assessment.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b

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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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CUAATS301 Work effectively in the Aboriginal and Torres Strait Islander visual arts industry

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the performance outcomes, skills and knowledge required to build on existing knowledge of the Aboriginal and Torres Strait Islander visual arts industry and apply new knowledge to working with others to support visual arts practice.

It applies to individuals who are working as part of a team in the Aboriginal and Torres Strait Islander visual arts industry. Individuals could be working in urban, regional, rural or remote settings. The work environment could involve interactions with artists and their communities in contexts such as cultural/arts centres and cooperatives, commercial and public galleries, museums, retail outlets, community projects, exhibitions, events and festivals.

This unit reflects the diversity of Aboriginal and Torres Strait Islander cultures and visual arts practices. It emphasises the importance of Aboriginal and Torres Strait Islander peoples controlling their own cultural heritage and identity.

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

Unit Sector

Aboriginal and Torres Strait Islander visual arts

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. Extend knowledge of the Aboriginal and Torres Strait Islander visual arts industry	1.1 Use sources of information to develop understanding of the diversity of visual arts practices by Aboriginal and Torres Strait artists, including local and regional artists 1.2 Identify individuals, organisations and networks that support local and regional Aboriginal and/or Torres Strait Islander visual arts practice 1.3 Identify current examples of cultural, social and economic impacts on Aboriginal and/or Torres Strait islander visual arts practice 1.4 Apply knowledge of the industry to work activities to support Aboriginal and/or Torres Strait islander visual arts practice
2. Perform work according to legal, ethical, cultural and enterprise requirements	2.1 Complete work activities demonstrating an awareness of cultural protocols 2.2 Comply with legal and ethical requirements as they apply to everyday work 2.3 Follow procedures to minimise the environmental impact of work activities
3. Update and maintain knowledge of the Aboriginal and Torres Strait Islander visual arts industry	3.1 Establish and maintain networks to ensure industry knowledge of issues and trends is current 3.2 Collect information about career development opportunities in the industry 3.3 Identify areas for skill and knowledge development in consultation with appropriate people 3.4 Undertake skill and knowledge development activities relevant to everyday 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
Learning	1.1, 3.1, 3.4	• Builds on prior knowledge and seeks opportunities to learn by using relevant sources of information, networks and everyday work activities

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Oral Communication	1.1, 2.1, 3.3	• Participates in a verbal exchange of ideas and uses listening and questioning techniques to confirm understanding
Reading	1.1, 1.2	• Accesses and integrates information about the industry from familiar, and some unfamiliar, texts
Navigate the world of work	1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 3.4	• Seeks advice and targets required skills and experience for work or career advancement • Takes steps to develop skills and experience for work or career advancement • Understands roles and responsibilities related to the industry • Follows cultural protocols and legal and ethical requirements related to the role
Interact with others	1.4, 2.1, 3.1, 3.3	• Follows communication practices and protocols in routine work situations and makes some adjustments to personal communication style in recognition of diverse perspectives • Participates in formal and informal conversations relevant to role and forms connections with others who can contribute to work outcomes
Get the work done	1.4, 2.1, 2.2, 2.3	• Plans and implements tasks and makes decisions in familiar situations • Identifies and proposes small changes to work activities to incorporate new knowledge

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAATS301 Work effectively in the Aboriginal and Torres Strait Islander visual arts industry	CUVATS301 Work effectively in the Aboriginal and Torres Strait Islander visual arts industry	Code updated to reflect change of training package name. Minor edits to wording of assessment conditions.	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAATS301 Work effectively in the Aboriginal and Torres Strait Islander visual arts industry

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- apply a general knowledge of the Aboriginal and Torres Strait Islander visual arts industry to work activities that support Aboriginal and/or Torres Strait Islander visual arts practice
- access and produce a range of information about Aboriginal and/or Torres Strait Islander visual arts practice, artists and/or their communities in a culturally respectful way
- identify areas for personal skill and knowledge development and plan for how this development will be achieved.

Note: If a specific volume or frequency 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 role of some relevant industry peak bodies
- explain how visual arts practice and industry can impact on the environment
- provide examples of cultural, social and economic impacts affecting Aboriginal and Torres Strait Islander visual arts practice
- identify individuals, networks and organisations relevant to the industry
- broadly outline copyright and intellectual property issues relevant to the industry
- provide examples of legal and ethical requirements relevant to own work
- discuss key principles and protocols for working with Aboriginal and/or Torres Strait Islander cultural material and interacting with artists, their families and/or communities
- describe respectful communication and consultation practices relevant to own work
- summarise types of career development opportunities in the industry
- differentiate between the range of visual arts practices by Aboriginal and/or Torres Strait Islander artists, with reference to region, medium, style and form

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- outline examples of how industry workers and organisations support Aboriginal and/or Torres Strait Islander visual arts practice.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in Aboriginal and Torres Strait Islander visual arts industry environments. The assessment environment must include access to:

- Aboriginal and/or Torres Strait Islander visual art, artists and/or their communities
- culturally appropriate processes and techniques suited to the language and literacy capacity of learners and the work being performed.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAATS504 Work with Aboriginal and Torres Strait Islander cultural material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to work with Aboriginal and Torres Strait Islander cultural material in a culturally appropriate manner. It involves the complex and interrelated elements of Aboriginal and Torres Strait Islander cultures, which are the cultural and intellectual properties of specific communities; elements that may only be interpreted by appropriate persons, for example those recognised by the local Aboriginal or Torres Strait Islander community as an Elder or custodian of local cultural knowledge.

It applies to individuals who source, handle, interpret and exhibit Aboriginal or Torres Strait Islander cultural material in accordance with specific cultural and consultative requirements. The cultural knowledge necessary to achieve competency in this unit may only be accessible to Aboriginal or Torres Strait Islander people. This unit also reflects that there is no single Aboriginal or Torres Strait Islander culture.

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

Unit Sector

Cultural services - Aboriginal and Torres Strait Islander cultural heritage

Elements 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 Aboriginal or Torres Strait Islander	1.1 Identify and locate cultural material that may be appropriate for

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ELEMENT	PERFORMANCE CRITERIA
cultural material	exhibition or display 1.2 Confirm traditional ownership of material in consultation with appropriate communities 1.3 Consult with traditional custodians to determine suitable keeping place for materials not authorised for general exhibition 1.4 Negotiate permission and advice for the use of cultural material according to cultural protocols 1.5 Complete documentation including records and agreements according to cultural protocols 1.6 Research issues and protocols in relation to the return of cultural material to local Aboriginal or Torres Strait Islander communities
2. Handle Aboriginal or Torres Strait Islander cultural material	2.1 Describe, move, store and maintain cultural material according to cultural requirements 2.2 Note aspects of objects that need repair or attention and take action within scope of own job role or refer to relevant personnel as required 2.3 Communicate specific cultural requirements to colleagues
3. Prepare Aboriginal or Torres Strait Islander cultural material for exhibition	3.1 Consult with custodians to agree on culturally appropriate approaches to promote, exhibit and display material, and limitations to mode of exhibit 3.2 Develop culturally appropriate interpretive approaches 3.3 Develop exhibition support materials that take account of cultural protocols in consultation with custodians 3.4 Communicate requirements for display or exhibition of cultural material to colleagues
4. Display and return Aboriginal or Torres Strait Islander cultural material	4.1 Display material according to agreed cultural protocols and consultation outcomes 4.2 Prepare material for return in accordance with cultural requirements 4.3 Return cultural material to local Aboriginal or Torres Strait Islander communities in accordance with established cultural issues and protocols

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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	1.6	• Gathers, interprets and analyses information from a range of sources and identifies key information that assists in determining job and cultural requirements
Writing	1.5, 2.2, 3.3	• Prepares specific information that conveys an understanding of outcomes and alternatives and uses accurate, specific and appropriate terminology appropriate to present to relevant personnel • Completes relevant supporting documentation using clear and technically specific language terminology that reflect appropriate cultural protocols
Oral Communication	1.2, 1.3, 1.4, 2.3, 3.1, 3.3, 3.4	• Uses culturally sensitive language to convey ideas and listens carefully to the needs of community members and custodians • Uses a range of persuasive responses appropriate to audience and environment and makes comparisons that show an understanding of requirements • Uses appropriate tone, pace and listening and questioning techniques to elicit others' views and confirm understanding
Navigate the world of work	1.1, 1.6, 2.1, 2.2, 3.1	• Takes responsibility for following explicit and implicit policies, procedures and protocols relevant to own role and the cultural requirements associated with work
Interact with others	1.2, 1.3, 1.4, 2.3, 3.1, 3.3, 3.4	• Shows respect for the values, beliefs and cultural expectations of others when communicating with colleagues and external stakeholders • Collaborates with others to achieve joint outcomes playing an active role in facilitating agreement
Get the work done	1.1, 1.6, 2.1, 2.2, 3.1, 3.3, 4.1, 4.2, 4.3	• Takes responsibility for planning, organising and implementing tasks and systems to manage and display culturally sensitive information and materials • Systematically gathers and analyses all relevant information and evaluates options in order to make informed decisions • Uses problem solving techniques to identify and analyse issues

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
CUAATS504 Work with Aboriginal and Torres Strait Islander cultural material	CULATS501A Work with Aboriginal and Torres Strait Islander cultural material	Updated to meet Standards for Training Packages and clarify intent.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAATS504 Work with Aboriginal and Torres Strait Islander cultural material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- source Aboriginal or Torres Strait Islander cultural material for display or exhibition
- consult in a culturally sensitive and effective manner with Aboriginal or Torres Strait Islander community members and custodians about the display of cultural material
- develop agreements for the use of cultural material and record them where required
- undertake activities preparing for the display of Aboriginal or Torres Strait Islander cultural material in a logical and efficient manner, demonstrating knowledge of cultural protocols and practices
- move, store, display, maintain and return cultural material in a manner consistent with established cultural protocols.

Note: If a specific volume or frequency 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 nature and scope of Aboriginal or Torres Strait Islander cultural material appropriate for exhibition or display
- identify appropriate keeping places for cultural material not suitable/forbidden for exhibition or display
- explain issues and protocols relating to the use and return of cultural material to Aboriginal or Torres Strait Islander communities
- identify copyright, moral rights and intellectual property issues with particular reference to Aboriginal or Torres Strait Islander cultural material
- identify sources of support for developing Aboriginal and Torres Strait Islander collections

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- describe current conventions of collection management, including appropriate consultations and respect for traditional custodianship when working with Aboriginal or Torres Strait Islander cultural material, including non-western concepts of collecting
- explain cultural protocols and appropriate consultations for identifying, moving, storing, maintaining and displaying cultural material in the relevant community context
- explain current industry policy on acquiring and managing Aboriginal and Torres Strait Islander cultural material.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in Aboriginal and Torres Strait Islander cultural heritage environments. The assessment environment must include access to:

- Aboriginal or Torres Strait Islander cultural material or information on material when access is not available
- information about cultural protocols.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Assessment must ensure involvement in the assessment process of persons approved of by Elders, appropriate persons or custodians of the relevant Aboriginal or Torres Strait Islander community.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM301 Move and store collection material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to handle, pack and unpack collection material when moving or storing it. It involves using techniques and materials suited to the material in accordance with established guidelines.

It applies to individuals who handle, move and store different types of collection material. Movement and storage may be within the same building of an organisation or to an external location. Storage may be short or long-term.

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

Unit Sector

Cultural services - collection 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 movement and storage requirements	1.1 Assess documentation to determine scope of work required for movement and storage of collection material 1.2 Identify organisational procedures and guidelines and specific requirements and confirm with relevant personnel 1.3 Assess collections to estimate projected current and future storage requirements with relevant personnel

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Seek specialist advice or assistance where required
2. Pack and unpack collection material	2.1 Select appropriate packing materials, tools and equipment and use safely 2.2 Handle collection material safely and in a manner that maintains integrity of collection material 2.3 Apply conservation and sustainability principles in the use of packaging materials 2.4 Label packaging to facilitate easy identification by others during transportation and within storage facilities 2.5 Recycle and dispose of waste responsibly
3. Move collection material	3.1 Select appropriate handling and moving equipment, and use safely 3.2 Handle collection material in a manner that protects individual items and contributes to efficient loading and unloading processes 3.3 Identify hazardous items and load them in a manner that minimises health and safety risk 3.4 Inspect load prior to transportation to ensure that items are loaded and secured appropriately, and make adjustments as required 3.5 Prepare transportation documentation
4. Arrange collection material and update records	4.1 Install, position or store collection material as required and within expected timeframes 4.2 Clear and clean work areas according to organisational procedures 4.3 Refer problems to relevant personnel as required 4.4 Update existing movement and storage records and prepare new records as required 4.5 Store records 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

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Reading	1.1, 1.2, 2.3, 3.4, 4.2, 4.5	• Reads and interprets documentation to determine requirements for moving and storing different types of collection material
Writing	2.4, 3.5, 4.4	• Legibly completes simple documentation, recording key information in a style and format relevant to requirements
Oral Communication	1.2, 1.3, 1.4, 4.3	• Seeks guidance and follows instructions to progress and complete work in accordance with industry and organisational processes and standards • Uses appropriate tone and language when communicating with others, including when making required arrangements for movement or storage
Numeracy	1.3	• Uses mathematical techniques to estimate time and measurement
Navigate the world of work	1.2, 1.4, 2.1, 2.3, 2.5, 3.1, 3.3, 4.2, 4.4, 4.5	• Understands roles and responsibilities for completion of tasks, seeking assistance when necessary • Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements
Interact with others	1.2, 1.3, 1.4, 4.3	• 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, 1.3, 2.1, 3.1, 3.4, 4.1, 4.4	• Plans and implements routine tasks and workload in a time-efficient manner • Analyses task requirements in order to decide on appropriate equipment and practices • Makes routine decisions based on implementation of standard procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUACNM301 Move and store collection material	CULCNM303A Move and store collection material	Updated to meet Standards for Training Packages and clarify intent.	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUACNM301 Move and store collection material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- identify nature and scope of movement or storage work through review of workplace documentation and consultation with relevant personnel
- determine the job-specific requirements, based on the collection material to be moved and stored, and any cultural protocols and stakeholders to be considered
- prepare identified requirements, seeking specialist advice or assistance where required
- handle, move and store collection items using appropriate tools, equipment, techniques and organisational procedures to maintain the integrity of the collection material and meet required timeframe for movement and storage
- use safe and sustainable work practices during movement and storage work to:
  - handle collection material safely
  - use transport equipment and packaging material safely
  - minimise hazards during the 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:

- explain the key organisational procedures and guidelines relating to:
  - storage and transport documentation and records
  - use of materials, tools and equipment, including labelling
  - manual handling and work health and safety (WHS) procedures and requirements
  - preventive pest management processes
  - waste recycling and disposal
- describe the packing and storage approaches and techniques for:

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  - culturally sensitive material
  - different types of collection material
  - internal and external transportation
  - short and long-term storage
- explain the record-keeping procedures for collection movement and storage
- identify the security requirements and issues to be considered when moving or storing collection material.
- list sources of specialist advice for moving and storing collection material.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a collection to be moved and stored
- materials, tools and equipment for packing, moving and storing collection items
- organisational procedures relating to moving and storing collection material
- sources of advice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM401 Assess the significance of collection objects

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to complete significance assessments of collection objects. Significance is determined by applying criteria including value, meaning and history attached to objects.

The unit applies to individuals who work in both small and large organisations assessing the significance of objects in collections or being considered for inclusion in collections. In smaller organisations, the role may be undertaken by individuals with broader management responsibilities, by committees and boards of management, or combinations of different personnel. In larger organisations, specialised curatorial staff may undertake this role.

The significance of collection objects relates to their value to past, present and future generations and may apply to their aesthetic, historical, scientific or social value. In this unit, significance assessment is undertaken autonomously, according to established procedures but in consultation with others.

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

Unit Sector

Cultural services - collection 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. Prepare to assess the significance of objects	1.1 Research the need for significance assessment, using relevant sources of information 1.2 Determine goal of undertaking significance assessment 1.3 Identify organisational policies that relate to significance assessment of objects
2. Apply assessment methodology	2.1 Compile object files containing available details about objects and their history 2.2 Research the history and provenance of objects and explore their wider historical and environmental context 2.3 Consult with relevant personnel to inform the context, provenance and social values of objects 2.4 Analyse and record the fabric, design, manufacture and condition of objects
3. Develop statements of significance	3.1 Identify comparative examples and evaluate them using primary and comparative criteria 3.2 Write statements of significance that describe the value and meaning of objects 3.3 Seek feedback from colleagues on statements of significance 3.4 Enter significance assessments into organisational records in the required format and within required timeframes
4. Review assessments of objects	4.1 Reassess significance of objects 4.2 Update statements of significance to reflect reassessment 4.3 Amend organisational records 4.4 Prepare recommendations for further action 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, 1.3, 2.2	• Locates and interprets information to determine job requirements

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Writing	2.1, 3.2, 3.4, 4.2, 4.3, 4.4	• Develops material for a specific audience and purpose using clear and detailed language in order to convey explicit statements and recommendations • Prepares and updates records in the required format to summarise key and significant information using correct spelling and grammar
Oral Communication	2.3, 3.3	• Participates in a verbal exchange of information and elicits the view and opinions of others regarding the provenance of objects by listening and questioning • Asks clarifying questions that elicit clearer or more detailed information
Numeracy	2.1, 2.2, 2.4, 3.1, 3.4	• Interprets numerical information and applies basic mathematical calculations to record the value of objects
Navigate the world of work	1.3, 2.1, 3.1, 4.3	• Takes responsibility for providing quality advice and information that complies with organisational requirements • Identifies and follow organisational policies and procedures
Interact with others	2.3, 3.3	• Collaborates and cooperates with others to discuss significance issues and achieve joint outcomes
Get the work done	1.1, 1.2, 2.1, 2.3, 2.4, 3.1, 3.4, 4.1, 4.4	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficient and effective outcomes • Uses analytical thinking techniques for identifying issues and generating possible solutions, seeking input from others as required • Applies analytical processes to resolve problems associated with determining the significance of objects • Uses digital technologies and systems to undertake research, enter data, and present and store information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUACNM401 Assess the significance of collection objects	CULCNM401A Assess the significance of collection objects	Updated to meet Standards for Training Packages and clarify intent.	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUACNM401 Assess the significance of collection objects

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- research the history, provenance and comparative examples of objects using reputable sources of information
- assess the significance of objects using the appropriate methodology and within required timeframes
- develop a statement of significance of the value and meaning of objects that includes:
  - considered assessment of the value, meaning and importance of objects
  - benchmark for future use
  - communication of values for interpretive programs
  - images, where available, of other comparative objects
  - record of the crucial provenance details and association of objects
  - summary of the meaning and importance of objects
  - summary of the process of investigation and assessment
- review assessment of objects and prepare recommendation for further action 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:

- locate and explain the purpose of the following organisational policies regarding managing collections and assessing objects:
  - policies for accessing and using sources of information for comparative examples
  - procedures for accessing reputable technical specialists
- explain the methodology for significance assessment of objects
- explain the difference between primary and comparative criteria in an assessment

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- describe the procedures for accessing reputable technical specialists
- list sources of information for comparative examples that relate to:
  - national, state and local government public records
  - online collections databases
  - 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 creative arts industry environments. The assessment environment must include access to:

- tools, equipment and storage system for statements of significance
- information sources
- objects to assess
- organisational policies and procedures related to significant assessments.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM402 Prepare display mounts for collection material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to prepare sites for the display of collection material. It focuses on the assembly and construction of display mounts and so has a strong link to general building and construction skills.

It applies to individuals who construct and assemble display areas with temporary or permanent components. In large cultural organisations, this work may constitute a complete job and be the responsibility of qualified tradespeople working under the guidance of curators and other specialised senior staff. In smaller organisations, people with a wide range of general and collection-management responsibilities may undertake this role, either under supervision or autonomously.

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

Unit Sector

Collection management - cultural 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. Plan construction of display mounts	1.1 Locate and confirm collection material to be displayed and the relevant liaison personnel 1.2 Interpret plans and other related documentation 1.3 Estimate and confirm site requirements according to

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ELEMENT	PERFORMANCE CRITERIA
	organisational procedures and guidelines associated with display components and assembly of mounts 1.4 Confirm mounting and display requirements, components and timelines 1.5 Assess potential risks and refer to relevant personnel
2. Prepare for the display of cultural material	2.1 Determine equipment and materials to be used 2.2 Check and test mounting and display components for compatibility with cultural and conservation requirements of collection material 2.3 Ensure that mounting and display components are capable of being disassembled and reassembled to meet relocation requirements 2.4 Maintain records relating to the preparation process and provide to relevant personnel
3. Construct or assemble mountings and display components	3.1 Assemble existing structure or complete construction according to organisational procedures and within required timeframes 3.2 Anticipate and address technical problems that arise during process within scope of own role or escalate if required 3.3 Record information relating to the construction and assembly, and refer to relevant personnel 3.4 Clean up work site and dispose of waste according to organisational procedures 3.5 Seek feedback on own work and note 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	1.2, 1.3, 3.1, 3.4	• Recognises and interprets information from a range of procedures, drawings, work plans and exhibition documentation to determine work requirements
Writing	2.4, 3.2, 3.5	• Uses clear and specialised language to accurately document requirements and outcomes
Oral	1.1, 1.5, 3.5	• Participates in a verbal exchange of ideas and elicits

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Communication		the view and opinions of others by listening and questioning • Uses appropriate tone and language when communicating with others
Numeracy	1.3, 1.4, 3.3	• Compares and calculates basic measurements relating to estimating display, mounting and site requirements • Calculates with whole numbers and routine fractions or decimals
Navigate the world of work	1.1, 1.4, 2.2, 3.1, 3.4	• Accepts responsibility and ownership for tasks and makes decisions about the need to coordinate work with others • Takes personal responsibility for following explicit and implicit policies, procedures and meeting deadlines
Interact with others	1.1, 1.4, 1.5, 3.3, 3.5	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1, 1.3, 1.5, 2.2, 2.3, 3.1, 3.2	• Takes responsibility for planning, sequencing and prioritising tasks and own workload to meet deadlines and achieve outcomes • Determines resources and equipment and works logically and systematically to undertake clearly defined and familiar tasks • Anticipates potential problems and contributes to solutions and risk management strategies • Uses appropriate methods and tools to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUACNM402 Prepare display mounts for collection material	CULCNM402A Prepare display mounts for collection material	Updated to meet Standards for Training Packages and clarify intent.	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUACNM402 Prepare display mounts for collection material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- assess and agree on mounting and display requirements with colleagues
- plan and organise construction work within required timeframes and established equipment and material supplies
- construct and assemble mountings for the display of collection material, or adapt an existing structure to accommodate the display, in a safe and sustainable manner
- finalise work processes, clean work site and dispose of or recycle waste
- complete records relating to finished 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:

- explain the common equipment, methods and materials used in the construction and assembly of mountings for the display of collection material
- identify conservation issues to be considered when displaying collection material
- explain security and site requirements for displaying collection material.
- explain construction and assembly techniques for commonly used display structures
- explain safe work practices and procedures used when preparing display mounts
- outline record keeping requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

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- equipment, tools and materials used for display of a collection
- collection material that needs to be mounted for display
- relevant policies and procedures manuals
- sources of specialist advice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM403 Work with cultural material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to comply with cultural and consultative requirements for sourcing, handling, interpreting and exhibiting cultural material that is not specifically of Aboriginal or Torres Strait Islander origin. It involves sourcing cultural material that could be relevant to an exhibition or display through research and consultation with community groups.

It applies to individuals who work in organisations that hold, research or display cultural material not specifically of Aboriginal or Torres Strait Islander origin. It applies to elements of cultures, and intellectual properties of communities, that are represented within Australian collecting institutions or which are held temporarily for display or research purposes.

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

Unit Sector

Cultural services - collection 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. Source cultural material	1.1 Identify and locate cultural material that may be appropriate for exhibition or display 1.2 Confirm traditional ownership of cultural material in consultation with appropriate communities

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Consult with community groups to determine suitable holding for materials not authorised for general exhibition 1.4 Negotiate permission and advice for the use of cultural material according to cultural protocols 1.5 Complete documentation including records and agreements according to cultural and organisational protocols
2. Handle cultural material	2.1 Describe, move, store and maintain cultural material according to cultural requirements 2.2 Note aspects of objects that need repair or attention and take action within scope of own job role or refer to relevant personnel as required 2.3 Communicate specific cultural requirements to colleagues
3. Prepare cultural material for exhibition	3.1 Consult with relevant community to establish culturally appropriate approaches to promote, exhibit and display material, and limitations on mode of exhibit 3.2 Develop culturally appropriate interpretive approaches 3.3 Develop exhibition support materials that take account of cultural protocols 3.4 Communicate requirements for display or exhibition of cultural material to colleagues
4. Display and return cultural material	4.1 Display material according to agreed requirements 4.2 Prepare material for return in accordance with cultural requirements 4.3 Return cultural material to community in line with established cultural issues and 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
Reading	1.1, 4.3	• Gathers, interprets and analyses information from a range of sources and identifies key information that assists in determining job and cultural requirements

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Writing	1.5, 2.2, 2.3, 3.3	• Prepares specific information that conveys an understanding of outcomes and alternatives and uses accurate, specific and appropriate terminology appropriate to present to relevant personnel • Completes relevant supporting documentation using clear and technically specific language and terminology that reflect appropriate cultural protocols
Oral Communication	1.2, 1.3, 1.4, 2.2, 2.3, 3.1, 3.4	• Uses culturally sensitive language to convey ideas and listens carefully to the needs of community members and custodians • Uses a range of persuasive responses appropriate to audience and environment and makes comparisons that show an understanding of requirements • Uses appropriate tone, pace and listening and questioning techniques to elicit others' views and confirm understanding
Navigate the world of work	1.1, 1.5, 2.1, 2.2, 3.1	• Accepts responsibility and ownership for tasks and makes decisions about the need for coordination with others • Takes personal responsibility for following explicit and implicit policies, procedures and cultural protocols • Seeks clarification or assistance when required
Interact with others	1.2, 1.4, 2.3, 3.1, 3.4	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to build rapport, seek or share information • Recognises and accommodates cultural differences and priorities of others
Get the work done	1.1, 2.1, 2.2, 3.1, 3.3, 4.1, 4.2, .4.3	• Takes responsibility for planning, organising and implementing tasks and systems to manage and display culturally sensitive information and materials • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Uses problem solving techniques to identify and analyse issues

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
CUACNM403 Work with cultural material	CULCNM404A Work with cultural material	Updated to meet Standards for Training Packages and clarify intent.	Equivalent Unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUACNM403 Work with cultural material

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- source cultural material for display or exhibition
- consult, in a culturally sensitive and effective manner, with relevant community representatives about the display of cultural material
- develop agreements for the use of cultural material and record them where required
- undertake activities preparing for the display of cultural material in a logical and efficient manner and demonstrating knowledge of cultural protocols and practices
- move, store, display, maintain and return cultural material in a manner consistent with established cultural protocols.

Note: If a specific volume or frequency 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 storage methods for cultural material that is unsuitable or forbidden for exhibition or display
- identify copyright, moral rights and intellectual property issues with particular reference to cultural material
- outline cultural protocols and appropriate consultation methods for the:
  - exhibition of cultural material in the relevant community context
  - identification, movement, storage and maintenance of cultural material in the relevant community context
  - negotiation of community permission to use cultural material.

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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 creative arts industry environments. The assessment environment must include access to:

- cultural material, or information on material when access is not available
- information about cultural protocols.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Assessment must ensure involvement in the assessment process of persons approved by appropriate persons or custodians of the relevant community.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM501 Assess the significance of collections

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to complete significance assessments for entire collections, or collections within a larger collection. Significance is determined by applying criteria including value, meaning and history attached to individual objects or collections as a whole.

The unit applies to individuals who work in collecting organisations and apply in-depth knowledge of collections and a range of specialised technical skills to make reasoned judgements and sound decisions when undertaking significance assessments that assist in the process of managing collections. In larger organisations, specialised curatorial staff may undertake this role. In smaller organisations, the role may be undertaken by individuals with broader management responsibilities, by committees and boards of management, or combinations of different personnel. Work is undertaken according to established procedures and in consultation with others.

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

Unit Sector

Cultural services - collection 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. Prepare to assess the significance of collections	1.1 Identify collections to be assessed

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ELEMENT	PERFORMANCE CRITERIA
	1.2 Determine purpose for undertaking significance assessment 1.3 Identify organisational policies that relate to significance assessment of collection 1.4 In consultation with colleagues, identify factors that may impact on the assessment and take these into account when planning work
2. Apply assessment methodology	2.1 Research the history and wider context of collections using sources of information 2.2 Review the scope and themes of collection and compare to organisational mission, purpose and key themes 2.3 Consult with relevant personnel to determine the social value of collection 2.4 Analyse and describe the condition of collection
3. Develop statements of significance	3.1 Identify and compare collection with similar collections 3.2 Assess significance against primary and comparative criteria 3.3 Write statements of significance that describe the value and meaning of collection 3.4 Seek feedback from colleagues on statement of significance 3.5 Enter significance assessment into organisational records in the required format and within required timeframes
4. Review assessments of collections	4.1 Reassess significance of collection 4.2 Update statement of significance to reflect reassessment 4.3 Amend organisational records 4.4 Prepare recommendations for further action 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, 1.3, 2.1, 2.2	• Locates, analyses and interprets information to determine job requirements
Writing	2.4, 3.3, 3.5, 4.2,	• Develops material for a specific purpose using clear

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	4.3, 4.4	and detailed language to convey explicit statements and recommendations • Prepares and updates records in the required format
Oral communication	1.4, 2.3, 3.4	• Provides and seeks information about collections using language and features appropriate to the audience and context • Uses questioning and listening skills to clarify understanding or seek more detailed information
Numeracy	2.4, 3.2, 3.3	• Interprets numerical information and applies basic mathematical calculations to record the value of collections
Navigate the world of work	2.2, 3.5, 4.3	• Works independently and collectively to achieve organisational outcomes in relation to assessing the significance of collections • Takes personal responsibility for following organisational policies and procedures
Interact with others	1.4, 2.3, 3.4	• Collaborates and cooperates with others to discuss significance issues and achieve joint outcomes
Get the work done	1.1, 1.2, 1.4, 2.1, 2.4, 3.1, 3.2, 3.3, 4.1, 4.4	• Plans, prioritises and implements tasks required to achieve outcomes according to workplace procedures and within timelines • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Considers how best to involve others in decision making, using collaborative processes as part of the decision-making process • Uses problem solving techniques to identify and analyse issues • Uses digital technologies and systems to undertake research, enter data and present information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUACNM501 Assess the significance of collections	CULCNM501A Assess the significance of collections	Updated to meet Standards for Training Packages and clarify intent.	Equivalent Unit

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Links

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Assessment Requirements for CUACNM501 Assess the significance of collections

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- identify the purpose of undertaking a significance assessment of collections
- identify factors that may impact on the significance assessment and plan work accordingly
- research history of collection, wider context, provenance information and comparative examples, identifying and accessing reputable sources of related information
- assess the significance of collection using the appropriate methodology and within required timeframes
- complete a significance assessment for a collection, developing a statement of significance of its value and meaning that includes:
  - considered assessment of the value, meaning and importance of collection
  - benchmark for future use
  - communication of values for interpretive programs
  - images, where available, of other comparative collections
  - record of the crucial provenance details and association of objects within collection
  - summary of the meaning and importance of collection
  - summary of the process of investigation and assessment
- consult effectively with relevant people about the provenance of objects in collection and the collection's significance.

Note: If a specific volume or frequency 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 organisational strengths, goals, policies and strategies in relation to managing and assessing collections

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- explain the methodology for significance assessment of collections
- explain the difference between primary and comparative criteria in an assessment
- describe the process for accessing technical specialists
- describe the process for locating, interpreting, interrogating and verifying sources of information to assist in assessing the significance of collections.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- tools, equipment and storage system for statements of significance
- information sources
- objects and items to assess
- organisational policies and procedures related to significance assessment
- sources of advice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUACNM601 Manage collection maintenance and preservation procedures

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to establish, manage and evaluate procedures for the care, maintenance and preservation of collections. It involves the use of analytical, communication and planning skills, as well as knowledge of specific issues that apply to the care, maintenance, minimisation of risk and preservation of both print and electronic materials.

It applies to individuals who work in leadership positions and who are responsible for the physical care of collections.

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

Unit Sector

Knowledge management - collection management

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Review and update maintenance and preservation procedures	1.1 Assess care and maintenance needs of specific collections based on knowledge of requirements of different types of materials 1.2 Assess the need for, and organise appropriate access to, specialist expertise 1.3 Ensure that where applicable, preservation procedures comply

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ELEMENT	PERFORMANCE CRITERIA
	with organisational digital preservation policy 1.4 Review and update policies, systems and procedures for the care, maintenance and preservation of material, anticipating and responding to problems and challenges that may arise 1.5 Incorporate organisational priorities and constraints when developing new and revising existing procedures 1.6 Communicate maintenance and preservation procedures to relevant staff
2. Establish risk-management strategies and procedures	2.1 Identify key risk factors for collections, including digital collections, and assess organisational capability to address risk 2.2 Develop appropriate risk-management strategies to prevent or minimise loss or damage in key areas, including the digital environment 2.3 Develop appropriate migration strategies to ensure preservation of data 2.4 Implement strategies, anticipating and responding to problems and challenges that may arise
3. Evaluate effectiveness of collection maintenance and preservation procedures	3.1 Instigate systems for regularly monitoring collection maintenance and preservation procedures 3.2 Monitor procedures and their implementation to identify aspects needing attention 3.3 Assess the application of safe and secure work practices and take action to address problems that arise 3.4 Contribute to monitoring the collection development and digital preservation policies of the organisation 3.5 Consult with colleagues on a regular basis to obtain feedback on maintenance and preservation procedures 3.6 Use feedback and outcomes of regular monitoring of staff performance and activities to improve procedures and to identify opportunities for own professional development

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	3.6	• Uses feedback to identify opportunities to improve own skills or knowledge
Reading	1.3, 1.4	• Interprets and critically analyses complex text, including ideas and opinions of others and applies general information to specific contexts
Writing	1.4, 1.5, 2.2, 2.3, 3.6	• Modifies and creates material that incorporates synthesis of knowledge and information using appropriate terminology and cohesive language in a format appropriate to purpose • Conveys detailed and specific information and instructions requiring concise use of vocabulary, syntax and grammar
Oral communication	1.2, 1.6, 3.5, 3.6	• Uses sophisticated listening and questioning techniques in discussion of complex ideas and concepts with a wide range of stakeholders, including collection specialists and colleagues • Explains procedures and instructions to others, choosing language appropriate to audience
Navigate the world of work	1.3, 1.4, 1.5, 3.1, 3.2, 3.3, 3.4	• Works autonomously making high level decisions to achieve and improve organisational goals • Takes a lead role in the development of organisational strategies and procedures
Interact with others	1.2, 1.6, 3.5, 3.6	• Uses a variety of relevant communication tools and strategies in building and maintaining effective working relationships • Shares knowledge, information and experience openly as an integral part of the working relationship
Get the work done	1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 3.4, 3.6	• Develops, manages and systematically reviews policies, systems and procedures for collection care, maintenance and preservation • Takes full responsibility for risk management, applying problem solving processes to determine solutions • Uses formal analytical and lateral thinking techniques for identifying issues, generating and evaluating possible solutions • Uses digital technologies to create, access and manage metadata • Shows awareness of the importance of data security and ensuring that digital preservation policies and procedures are implemented

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
CUACNM601 Manage collection maintenance and preservation procedures	CULICM602A Manage collection maintenance and preservation procedures	Updated to meet Standards for Training Packages and clarify intent. Minor edits to performance criteria.	Equivalent Unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUACNM601 Manage collection maintenance and preservation procedures

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- manage care and maintenance procedures to meet specific collection and organisational needs
- systematically review and monitor the organisation's policies and procedures for collection care, maintenance and preservation
- apply organisation's collection development policies and procedures, particularly the digital preservation policy
- evaluate the care and maintenance procedures of specific collections
- interact with colleagues and specialist experts on development issues, as required, to complement own skill set
- pursue opportunities for own professional development regarding new and emerging trends in maintenance and preservation procedures and strategies
- model due diligence and professionalism in complex judgements and decisions.

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

Knowledge Evidence

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

- detail strategies for the storage, display, preservation and conservation of different types of information materials
- identify risk factors for different types of information materials
- describe the nature of cooperative arrangements that exist between information services providers in relation to collection care and maintenance
- analyse issues that affect the care, maintenance and preservation of specific types of information materials, both print and electronic

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- identify copyright, moral rights and intellectual property issues that affect collection care and management
- review organisational collection development policies on the care, maintenance and preservation of specific information collections
- describe cultural protocols that impact on collection care and management
- discuss the purposes and objectives of existing digital preservation policies
- discuss the benefits and limitations of digital preservation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a collection for which procedures must be managed
- relevant policies and procedures manuals, including those relating to the preservation of digital collections.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUADIG303 Produce and prepare photo images

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to prepare photo images for integration into an interactive media sequence or product.

It applies to individuals who produce a variety of photo images for production of virtual worlds, from digital still composition to panoramas. They work closely with a programmer or interactive media author and may offer technical advice and support to a team.

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

Unit Sector

Visual Communication – Digital Content and Imaging

Elements 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 scanner to capture photo images	1.1 Source and identify appropriate photographic images according to requirements of photographic project brief 1.2 Discuss selection of images with relevant personnel, and check compliance with copyright conditions 1.3 Assess scanner features to confirm quality outcomes will meet brief requirements 1.4 Operate scanner according to manufacturer’s specifications

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Use appropriate scanner settings to ensure image output meets production requirements 1.6 Transfer and store photographic image files to a computer using standard naming conventions
2. Use digital camera to create photo images	2.1 Clarify photographic project brief with relevant personnel 2.2 Assess digital camera features to ensure outcome will meet requirements of brief 2.3 Plan camera shots, taking into account lighting, framing, composition and other relevant factors 2.4 Load and operate digital camera according to manufacturer's specifications 2.5 Consider digital camera focus, exposure and shutter speed to ensure image capture meets production requirements 2.6 Check photographic images meet brief requirements 2.7 Transfer and store photographic image files to a computer using standard naming conventions
3. Edit photo images	3.1 Load digital imaging software and import photo image source files 3.2 Adopt safe ergonomic practices when using screens and keyboards for extended periods of time 3.3 Manipulate and save digital images using designated digital imaging software 3.4 Create photo images that incorporate visual design and communication principles 3.5 Evaluate outcome for visual impact, effectiveness and fitness for purpose 3.6 Confirm images meet project requirements with relevant personnel
4. Prepare photo image assets	4.1 Save files in appropriate output format to meet platform requirements 4.2 Assign metadata tags if required 4.3 Group files logically in a folder system using standard naming conventions 4.4 Store files in share drive or repository for production team access

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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, 2.4-2.7, 4.1, 4.3	• Interprets textual information to follow equipment operation and project requirements
Writing	1.6, 2.7, 4.1-4.3	• Selects the vocabulary and conventions appropriate to text for naming files
Oral Communication	1.2, 2.1, 3.6	• Uses listening and questioning techniques to discuss project brief and to confirm outcomes • Uses descriptive and technical language to participate in oral exchanges
Navigate the world of work	1.2, 3.2	• Complies with legislative requirements
Interact with others	1.2, 2.1, 3.6	• Uses appropriate communication practices and protocols to confirm requirements and present images
Get the work done	1.1, 1.3-1.6, 2.2-2.7, 3.1, 3.3-3.6, 4.1-4.4	• Takes responsibility for logically planning and producing photo images according to design briefs and visual design principles • Makes decisions directly related to task completion • Utilises a range of features within digital cameras, scanners and digital imaging software to create and store photo images

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
CUADIG303 Produce and prepare photo images	CUFDIG303A Produce and prepare photo images	Updated to meet Standards for Training Packages. Minor edits to 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=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUADIG303 Produce and prepare photo images

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- use a scanner and digital camera to capture images that satisfy project briefs
- use digital imaging software and techniques, design and communication principles to produce images that meet project requirements
- save and store files 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:

- describe the features of a digital camera that are essential for creating images to the required standard
- outline the basic techniques used to compose camera shots
- explain how visual design and communication principles are are relevant to photography
- explain safe work practices in relation to working on computers for periods of time
- explain the procedure for checking copyright clearance.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a scanner and digital camera
- digital imaging software
- project briefs
- information or manuals about operating equipment.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP201 Assist with the staging of public activities and events

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to complete a range of tasks associated with setting up and staging public activities and events.

It applies to individuals who provide basic assistance at any type of public activity or event while under direct supervision.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Prepare for public activities or events	1.1 Clarify and confirm t event details and own role in set-up and staging of activity or event with supervisor 1.2 Confirm work plans, specific work requirements, and required resources with supervisor 1.3 Organise required resources within scope of own responsibility and required timeframes
2. Undertake on-site	2.1 Set up and maintain activities according to work plan and

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ELEMENT	PERFORMANCE CRITERIA
activities	requirements in consultation with supervisor and work colleagues 2.2 Participate in the delivery of activities as required in line with established procedures 2.3 Identify problems promptly and resolve within scope of individual responsibility or refer to supervisor
3. Finalise on-site activities	3.1 Pack up and clean up materials and site within required timeframes following health, safety and security procedures 3.2 Complete required documentation and submit 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	1.2, 3.1	• Interprets work instructions and requirements from key workplace information
Writing	1.3, 2.1, 3.2	• Records information in a sequential manner using clear and appropriate terminology
Oral Communication	1.1, 1.2, 2.1-2.4	• Articulates clearly using language appropriate to environment and audience • Uses listening and questioning techniques to clarify and confirm understanding of routine work issues
Numeracy	1.2, 2.1	• Correctly interprets and follows numerical information in work plans, timelines and other documentation
Navigate the world of work	2.4, 3.1	• Follows organisational procedures relevant to own role, seeking clarification when required
Interact with others	1.1, 1.2, 2.1, 2.4	• Follows accepted communication practices and protocols for reporting matters to supervisors
Get the work done	1.1, 1.3, 2.1, 2.4, 3.1, 3.2	• Follows clearly defined instructions and sequencing, and monitors own progress in meeting requirements, seeking assistance when necessary • Responds to predictable routine problems according to required procedures

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Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP201 Assist with the staging of public activities and events	CULEVP201A Assist with the presentation of public activities and events	Updated to meet Standards for Training Packages Change to unit title. Minor edits to performance criteria and elements to clarify intent.	Equivalent Unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAEVP201 Assist with the staging of public activities and events

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- identify own role and responsibilities in the set-up, maintenance and clean-up of public activity or event, and clarify with supervisor where necessary
- organise required resources in line with established work instructions
- undertake set-up, maintenance and clean-up activities safely and efficiently according to established work plan and procedures, and within required timeframes
- resolve or refer problems identified during work activities as required
- complete and submit documentation in line with work instructions and workplace procedures.

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

Knowledge Evidence

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

- explain key features of different types of public activities and events
- outline roles and responsibilities of key team members in the set-up and operation of public activities and events
- outline key procedures and practices required in the set-up, maintenance and clean-up of public activities and events, including
  - emergency procedures relevant to the work context
  - safe work practices relevant to public activities and events
  - security requirements relevant to public activities and events.

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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 creative arts industry environments. The assessment environment must include access to:

- a location in which events or activities take place
- an activity or event on which the candidate can work
- interaction with others involved in staging a public activity or event.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP401 Present information on activities, events and public programs

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to prepare and present information on activities, events and public programs to different customer groups. The unit involves integrating effective interpretation and communication techniques into an engaging presentation and delivering it according to established guidelines.

It applies to individuals who present information in on activities, events and public programs. It applies in a broad range of industry contexts.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Plan delivery of information	1.1 Confirm details of activity, event or public program with relevant personnel 1.2 Plan required delivery sequence and method to achieve established objectives 1.3 Identify and access or prepare facilities, resources and support materials required for presentation delivery

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ELEMENT	PERFORMANCE CRITERIA
2. Prepare presentation	2.1 Source or develop content for presentation of information, seeking expert advice on the subject matter where required 2.2 Identify appropriate interpretive and presentation techniques to be used that combine entertainment and learning and enhance audience engagement 2.3 Finalise tailored presentations that meet the specific needs of audience within required timeframes
3. Deliver presentation	3.1 Present accurate and relevant information in a manner consistent with cultural and social sensitivities and organisational requirements 3.2 Adjust presentation delivery based on audience response, unexpected events or changes in circumstances 3.3 Provide opportunities for audience participation where appropriate 3.4 Identify and resolve problems promptly within scope of own role 3.5 Implement contingency plans or refer to appropriate personnel as required
4. Evaluate feedback	4.1 Seek formal or informal feedback from participants and colleagues according to organisational procedures and established evaluation methods 4.2 Monitor participation levels and provide attendance and participation information to relevant personnel 4.3 Revise supporting documentation incorporating feedback 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	3.1, 4.1	• Checks completeness and accuracy of information • Interprets a wide range of sources to identify and tailor relevant key information
Writing	2.1, 2.3, 4.1, 4.3	• Uses clear, specific and industry-related terminology to complete and update workplace documentation • Prepares information for presentation and evaluation

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		purposes using language, format and style appropriate to the audience and purpose
Oral communication	3.1, 3.2, 3.3, 4.1	• Participates in a verbal exchange of ideas/solutions and uses detailed and clear language to clarify and present information according to requirements and audience • Uses a range of verbal responses and makes adjustments according to audience reactions
Numeracy	4.2	• Uses basic arithmetic to calculate timing and duration of presentation and participation data
Navigate the world of work	3.1, 3.4, 4.1	• Takes personal responsibility for following explicit and implicit policies and procedures • Accepts responsibility for and ownership of tasks
Interact with others	1.1, 3.2, 3.3, 3.5, 4.1, 4.2	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Adapts personal communication style to show respect for the opinions, values and particular needs of others • Works collaboratively with others
Get the work done	1.2, 1.3, 2.1, 2.3, 3.2, 3.3, 3.4, 3.5, 4.3	• Takes responsibility for planning and organising own workload to meet deadlines • Determines job resources and equipment and works logically and systematically to undertake clearly defined and familiar tasks • Accepts responsibility for addressing less predictable problems and responds intuitively to those requiring immediate resolution • Applies analytical and lateral thinking to the process of creating effective presentation material and activities • Uses the main features and functions of digital tools to complete work tasks and present information in effective ways

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP401 Present information on activities, events and public programs	CULEVP401A Present information on activities, events and public programs	Updated to meet Standards for Training Packages and clarify intent.	Equivalent Unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAEVP401 Present information on activities, events and public programs

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- translate understanding of required information, objectives, and type of audience into engaging presentations within required timeframes
- effectively use and adapt a range of interpretation and presentation techniques to present information that meets the various needs of different audiences, including those with special needs
- engage audiences in the delivery of above presentations as part of an activity, event or public program
- identify and resolve problems or implement contingency plans during presentations
- obtain and respond to formal and informal participant feedback in accordance with workplace procedures 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:

- list available sources of expert advice on the relevant subject matter
- identify features of policies, procedures and practices relating to the provision of public activities, events and programs
- discuss the needs and expectations of different customer groups, including potential cross-cultural communication requirements and protocols
- outline presentation techniques that could be used with a range of customer groups
- explain typical resources required for delivery of activities relevant to the workplace context.

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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 creative arts industry environments. The assessment environment must include access to:

- an activity, event or public program in a venue or site where information must be delivered
- an opportunity to present to and interact with a customer group of a size and nature that reflects a typical work environment.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP402 Design and develop interpretive displays

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to design and develop small displays to assist in interpreting collections or sites. It involves using visual design and interpretive skills to present material in creative and interesting ways.

It applies to individuals who develop small interpretive displays of collection material and who mostly work independently or in small organisations.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop ideas for displays	1.1 Consult with colleagues and other stakeholders to confirm exhibition or display objectives 1.2 Explore interpretive display ideas in the context of the collection and established objectives 1.3 Research relevant information on audience profile and need in order to inform interpretive approaches 1.4 Obtain and assess operational information that may impact on

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ELEMENT	PERFORMANCE CRITERIA
	the development of displays 1.5 Evaluate existing storylines and conduct research to develop new themes or storylines 1.6 Identify the need for assistance and where required seek input from interpretive or subject matter specialists 1.7 Prepare interpretive display proposals for approval as required
2. Create interpretive displays	2.1 Plan and schedule display approaches and communication media within required timeframes, using established techniques and available resources 2.2 Organise display spaces that meet intended objectives and reflect the principles of universal access 2.3 Select and organise relevant materials and equipment making creative use of available materials and supplies 2.4 Participate in creating and installing displays according to organisational procedures, identifying and resolving problems promptly within scope of own role 2.5 Maintain displays in line with organisational procedures
3. Evaluate interpretive displays	3.1 Obtain formal and informal feedback from customers on effectiveness of display materials 3.2 Challenge and test designs through own evaluation and consultation 3.3 Seek feedback from colleagues to enhance current and future displays

Foundation Skills

This section 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, 1.5	• Recognises and interprets a range of supporting information to determine and adhere to display requirements
Writing	1.7, 2.4	• Uses factual information and industry-related terminology to complete required workplace documentation

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		• Records ideas and requirements clearly and creatively based on techniques appropriate to audience and environment
Oral communication	1.1, 1.6, 3.1, 3.3	• Elicits the view and opinions of others by listening and questioning • Clearly articulates requirements using language appropriate to audience and environment and participates in a verbal exchange of ideas/solutions
Navigate the world of work	1.4, 1.6, 1.7, 2.4, 2.5	• Accepts responsibility and ownership for tasks and makes decisions on completion parameters and the need of coordination with others • Takes personal responsibility for following explicit and implicit policies and procedures
Interact with others	1.1, 1.6, 2.4, 3.1, 3.3	• 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, 1.7, 2.1, 2.2, 2.3, 3.1, 3.3	• Determines resource and equipment requirements and works logically and systematically to undertake work activities within agreed timelines • Uses analytical thinking techniques and visual literacy skills to generate creative displays, seeking input from others as required • Uses analytical and lateral thinking to review display approaches and suggest improvements • Uses the features and functions of digital tools, to create effective displays

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP402 Design and develop interpretive displays	CULEVP402A Design and develop interpretive displays	Updated to meet Standards for Training Packages and clarify intent.	Equivalent Unit

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Links

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Assessment Requirements for CUAEVP402 Design and develop interpretive displays

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- research and develop new ideas, themes and storylines for interpretive displays that reflect exhibition or display objectives
- within required timeframes and in accordance with workplace procedures and requirements, design and develop interpretive displays that:
  - address specific audience profiles
  - demonstrate the use of different display techniques
  - engage audiences while meeting design and technical principles
- demonstrate visual literacy skills while creating displays that show:
  - creative use of materials to enhance displays
  - diverse design displays
  - evaluation of storylines
  - work at a basic level with colour, shape and layout
- participate in the planning and staging of interpretive displays, coordinating required resources and scheduling activities within scope of own role
- identify and resolve problems when creating and installing displays within scope of own role
- obtain and respond to formal and informal feedback to enhance current and future displays.

Note: If a specific volume or frequency 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 basic principles of design that relate to the interpretive displays

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- outline organisational procedures for creating and installing interpretive displays
- identify potential uses of technology in interpretive displays
- identify the range of materials and equipment used for interpretive displays
- outline the role of interpretive displays in enhancing access to cultural material
- discuss techniques and conventions for:
  - creating small displays
  - developing effective interpretive labels, including production and installation techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a collection to use for a display
- materials and equipment to assist in the development of interpretive displays
- information on audience profile.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP403 Install and dismantle exhibition elements

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to install and dismantle the physical elements of permanent and temporary exhibitions. It involves working in line with established exhibition plans and procedures.

It applies to individuals who work under guidance and supervision as exhibition venue staff or independent exhibition contractors in both business and community environments.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Confirm exhibition specifications	1.1 Review exhibition documentation and confirm requirements with relevant personnel 1.2 Identify materials, equipment and resources required for exhibitions with the assistance of relevant personnel 1.3 Confirm procedures and responsibilities for handling collection material, and installing and dismantling exhibitions 1.4 Establish an agreed project timeline with stakeholders

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ELEMENT	PERFORMANCE CRITERIA
2. Prepare exhibition sites	2.1 Confirm site alterations are made in response to installation purposes 2.2 Ensure site is suitable and secure according to technical specifications 2.3 Complete or organise on-site construction as required
3. Position and remove exhibition elements	3.1 Install and dismantle exhibition elements according to exhibition requirements, available floor plans, and safety and security requirements 3.2 Pack, unpack, handle and move physical elements according to agreed plans, within required timeframes, and in line with scope of individual responsibility 3.3 Use safe manual handling techniques consistent with organisational procedures respecting the integrity of exhibition elements 3.4 Identify and resolve problems promptly within scope of own role
4. Finalise process	4.1 Clear and clean work areas according to organisational procedures, and safe and sustainable work practices 4.2 Return elements safely to appropriate locations according to exhibition documentation and plans 4.3 Follow required recordkeeping procedures regarding installing and dismantling exhibition elements

Foundation Skills

This section describes language, 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, 4.3	• Comprehends information in a variety of procedures, drawings, work plans and exhibition documentation to determine requirements
Writing	4.3	• Uses industry-related terminology to complete required workplace documentation
Oral communication	1.1, 1.4	• Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information

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Numeracy	1.1, 3.1, 3.2, 4.2	• Interprets mathematical information embedded in floor plans and other documentation • Uses basic arithmetic to count items and calculate measurements and time
Navigate the world of work	1.3, 2.2, 3.1-3.3, 4.1-4.3	• Understands responsibilities and boundaries of own role • Complies with policies, procedures and regulatory requirements
Interact with others	1.1, 1.4	• Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met
Get the work done	1.1-1.4, 2.1, 2.3, 3.1, 3.2, 3.4, 4.3	• Plans, organises and completes required tasks according to procedures • Identifies problems and takes appropriate action to resolve them

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP403 Install and dismantle exhibition elements	CULEVP403A Install and dismantle exhibition elements	Updated to meet Standards for Training Packages and clarify intent. Minor edits to elements.	Equivalent Unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAEVP403 Install and dismantle exhibition elements

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- identify exhibition requirements and confirm procedures and processes for installation and dismantling with relevant people
- work with others to prepare exhibition by agreed timelines, including:
  - confirming that the site has been prepared
  - installing and dismantling exhibition elements according to requirements
  - packing, unpacking, handling and moving physical elements of exhibitions with care
  - using safe manual handling techniques
  - identifying and resolving or referring problems to others
- follow procedures for recordkeeping, cleaning and returning elements.

Note: If a specific volume or frequency 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 exhibition components relevant to the work or industry context
- explain typical processes for installing and dismantling an exhibition
- outline roles and responsibilities of personnel involved in staging exhibitions
- explain packing materials and techniques used for a range of exhibition elements
- identify tools commonly used for installing and dismantling exhibitions
- explain key features of organisational procedures, guidelines and requirements relating to installing and dismantling exhibition elements:
  - cleaning
  - purchasing required supplies
  - record-keeping

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- security issues when work is underway
- storage of packaging materials
- work health and safety requirements
- waste disposal.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- plans and other exhibition documentation
- physical exhibition elements
- a venue to install or dismantle
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP501 Coordinate the installation and dismantling of exhibitions

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to organise and monitor the installation and dismantling of physical exhibition elements.

It applies to individuals who work as exhibition venue staff or independent exhibition contractors in many different contexts in both business and community environments. They tend to be autonomous, and may be required to lead and manage a team and consult with various exhibition stakeholders.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify physical resource requirements	1.1 Review exhibition documentation to determine the scope and type of exhibition elements required 1.2 Confirm budget and resources required for exhibitions 1.3 Provide appropriate input into the overall planning of exhibitions

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Check inventory to determine availability of physical resources 1.5 Order additional resources as required and according to organisational procedures and budgetary guidelines 1.6 Assess the need for specialist or external assistance and where required organise according to organisational procedures
2. Plan the installation and dismantling of exhibitions	2.1 Liaise with exhibition personnel to determine the most effective sequence for installing and dismantling exhibitions 2.2 Document plans for installation or dismantling according to organisational procedures 2.3 Confirm availability of resources in advance of installation and dismantling 2.4 Organise physical resources
3. Coordinate operations	3.1 Provide clear instructions to relevant personnel in relation to installation or dismantling to ensure safety and avoid damage to physical elements 3.2 Monitor operations to ensure that work is carried out according to instructions and within required budget and timeframes 3.3 Deal with problems that arise in ways that minimise disruption to work operations and schedules 3.4 Organise appropriate storage and security of exhibition elements, including valuable items and hazardous materials
4. Complete exhibition operations	4.1 Complete relevant exhibition documentation and reports and forward to relevant personnel as required 4.2 Seek feedback from stakeholders and team members about ways to improve processes 4.3 Identify aspects of operations that worked well and ways to enhance those aspects 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

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Reading	1.1, 1.4	• Gathers and interprets information in a variety of procedures, drawings, work plans and exhibition documentation to determine and meet requirements
Writing	2.2, 4.1	• Develops textual information for a specific audience using clear and detailed language and numerical data to convey information, requirements and recommendations
Oral communication	1.6, 2.1, 3.1, 4.2	• Interacts effectively in verbal exchanges, using language and features appropriate to the audience and context • Uses active listening and questioning skills to clarify information and to elicit the views and opinions of others • Provides clear instructions to others
Numeracy	1.2, 1.4, 1.5, 4.1	• Uses mathematical skills to monitor project costs, budgets and timeframes
Navigate the world of work	1.5, 1.6, 2.2, 3.1	• Understands and complies with organisational policies and procedures and regulatory requirements
Interact with others	1.6, 2.1, 3.1, 4.2	• Collaborates with others to achieve joint outcomes playing an active role in leading work operations
Get the work done	1.1-1.6, 2.1- 2.4, 3.2-3.4, 4.1, 4.3	• Plans and schedules complex activities for self and others, taking responsibility for determining job priorities, resources and equipment • Monitors progress of plans making adjustments when required and addresses problems that arise • Uses problem-solving skills to identify and address issues that arise

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP501 Coordinate the installation and dismantling of exhibitions	CULEVP501A Coordinate the installation and dismantling of exhibitions	Updated to meet Standards for Training Packages and clarify intent.	Equivalent Unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAEVP501 Coordinate the installation and dismantling of exhibitions

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- use documentation to determine exhibition elements, budget and resource requirements
- discuss and document plans for installation and dismantling of exhibitions
- instruct and supervise personnel who are installing and dismantling exhibition components to ensure safe handling of all elements
- organise and manage resources, storage and security of exhibition elements
- deal efficiently with disruptive issues that may arise in the context of installing and dismantling exhibitions
- complete required 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 organisational procedures, guidelines, processes and requirements relevant to the following exhibition installation and dismantling elements:
  - budget
  - inventory systems and procedures used for equipment and materials in the context of exhibitions
  - security
  - recordkeeping
  - technical procedures for handling physical elements, including artworks and historical objects
  - cleaning and waste disposal.
- discuss cultural protocols that could impact on installation and dismantling

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- identify packing materials and techniques used for different types of exhibition elements
- list tools commonly used for installing and dismantling exhibitions and describe their safe use
- outline relevant organisational and legislative work health and safety requirements, including those that affect the allocation of work and the movement of physical elements
- outline roles and responsibilities of personnel involved in staging exhibitions
- list sources of exhibition equipment and supplies
- identify sources of specialist assistance relevant to the work context.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- an exhibition venue
- physical exhibition elements
- exhibition documentation
- organisational procedures
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAEVP502 Develop and implement exhibition interpretive strategies

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to develop, implement and evaluate overall interpretive strategies for exhibitions.

It applies to individuals who apply their skills are in cultural settings, such as museums, galleries and cultural centres. They tend to be autonomous, may lead and manage a team and consult and collaborate with stakeholders.

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

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Define communication needs	1.1 Analyse overall exhibition concepts to determine broad parameters for interpretive strategies 1.2 Review relevant exhibition documentation to inform strategy development 1.3 Source relevant information on audience profile and research their characteristics and needs 1.4 Establish links between audiences, concepts and proposed

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ELEMENT	PERFORMANCE CRITERIA
	storylines and themes 1.5 Consult with appropriate stakeholders to confirm communication needs
2. Prepare interpretive strategies	2.1 Document aspects of interpretive strategies based on analysis and consultation and according to organisational policies and procedures 2.2 Develop options and approaches to take account of audience needs, overall objectives, operational constraints and the principles of universal access 2.3 Refine strategies through testing and challenging ideas and feedback from colleagues 2.4 Identify and source specialist advice where required 2.5 Prepare strategies in an appropriate format and within required timeframes 2.6 Communicate strategies to relevant colleagues and stakeholders
3. Oversee implementation of interpretive strategies	3.1 Organise internal and external resources for development of materials to support the interpretive strategy 3.2 Monitor the production of materials and suggest adjustments to ensure objectives are achieved 3.3 Facilitate coordinated approach through ongoing consultations with other exhibition personnel 3.4 Deal with problems that arise in ways that minimise disruption to work operations and schedules
4. Evaluate interpretive strategies	4.1 Establish appropriate evaluation mechanisms with relevant stakeholders 4.2 Use agreed evaluation mechanisms to assess the success of interpretive strategies 4.3 Share knowledge gained from evaluation 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

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Reading	1.1, 1.2, 1.3, 2.1, 2.4, 2.5, 3.2, 4.1, 4.2	• Interprets textual and visual information to establish and monitor strategies
Writing	2.1, 2.5, 4.1, 4.2	• Prepares documentation using appropriate industry terminology in required format • Conveys ideas clearly and appropriately for the target audience
Oral communication	1.5, 2.1, 2.3, 2.4, 2.6, 3.3, 4.1, 4.3	• Interacts effectively in verbal exchanges, using language and features appropriate to the audience and context • Uses active listening and questioning skills to clarify information and to elicit the views and opinions of others
Numeracy	3.1, 3.2	• Uses basic mathematical processes to manage resource and expenditure
Navigate the world of work	2.1, 2.2	• Takes full responsibility for following policies and procedures
Interact with others	1.5, 2.1, 2.3, 2.4, 2.6, 3.3, 4.1, 4.3	• Collaborates and cooperates with others to contribute and elicit creative ideas that lead to effective joint outcomes • 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, 2.5, 3.1, 3.2, 3.3, 3.4, 4.2, 4.3	• Accepts responsibility for planning, developing and implementing interpretive strategies • Uses problem-solving techniques to identify, analyse and resolve issues • Evaluates outcomes of decisions and strategies to identify opportunities for improvement

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAEVP502 Develop and implement exhibition interpretive strategies	CULEVP502A Develop and implement exhibition interpretive strategies	Updated to meet Standards for Training Packages and clarify intent. Minor edits to 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=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAEVP502 Develop and implement exhibition interpretive strategies

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- determine broad parameters for interpretive strategy based on analysis of exhibition concepts and documentation, audience profile and potential storylines and themes
- refine options and approaches for strategies through consultation and testing, drawing on specialist advice where required
- develop operationally realistic exhibition interpretive strategies that meet audience and organisational needs
- implement interpretive strategies for exhibition concepts within required timeframes, dealing efficiently with potentially disruptive issues that arise
- select and use evaluation mechanisms that inform future work 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 roles of different people involved in the exhibition development process and how they interrelate
- discuss the purpose of an exhibition interpretive strategy and its impact on all aspects of exhibition development and implementation
- outline exhibition development concepts, including:
  - themes
  - sub-themes
  - storylines
  - interpretation
- explain principles of interpretation at a detailed level

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- explain processes for drawing links between collections, audience needs and interpretive approaches
- discuss commonly used interpretive approaches, including specific techniques and technical issues associated with their use
- outline cultural protocols relevant to the development of interpretive strategies, including those for exhibitions of Aboriginal or Torres Strait Islander material
- outline principles of universal access and different audience communication needs, including potential specific needs
- explain the key features of evaluation mechanisms suitable to evaluate interpretive strategies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- an exhibition concept or idea for which an interpretive strategy can be developed
- resources required to produce interpretive support materials
- interaction with others to reflect the collaborative nature of the development process.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAFIM401 Obtain revenue to support operations

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to set revenue-raising goals, identify potential sources of revenue and to proactively work to secure revenue.

It applies to individuals who work with a large degree of independence and who work in variety of roles from sole practitioners through to senior administrators. Revenue could be raised from corporate sponsorship or grants from philanthropic trusts or government agencies.

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. Set revenue-raising goals	1.1 Identify potential revenue sources from a range of information sources 1.2 Identify factors that may affect the suitability of potential revenue sources 1.3 Evaluate suitability of revenue sources in relation to own or organisational overall vision 1.4 Identify revenue-raising priorities in line with current direction

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ELEMENT	PERFORMANCE CRITERIA
	and vision in consultation with relevant people 1.5 Determine how and from which sources revenue will be raised
2. Implement revenue-raising strategies	2.1 Identify processes to follow to access potential revenue 2.2 Build and maintain positive relationships with key stakeholders who can provide financial support 2.3 Coordinate development of funding proposals 2.4 Negotiate terms and conditions of funding agreements 2.5 Clarify commitments made by both parties and communicate these to relevant people
3. Evaluate revenue-raising strategies	3.1 Monitor all arrangements to ensure compliance with funding requirements 3.2 Review the impact of funding on self or the organisation 3.3 Review priorities and revenue-raising strategies and amend 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, 2.4, 2.5, 3.1	• Interprets and evaluates complex and unfamiliar information about revenue sources, and terms and conditions of funding agreements
Oral Communication	1.4, 2.2, 2.4, 2.5	• Uses questioning and active listening techniques to elicit different perspectives about revenue raising priorities • Articulates needs clearly using specific, relevant and persuasive language to liaise and negotiate with financial supporters
Numeracy	2.4, 3.1, 3.2	• Interprets financial data which may be embedded in a range of documents
Interact with others	1.4, 2.2, 2.4, 2.5	• Collaborates with others to generate ideas for revenue raising priorities and solutions to achieve goals • Invests time and energy to build rapport with financial supporters as an integral part of the business

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		relationship
Get the work done	1.4, 1.5, 2.1, 2.3 3.1, 3.3	• Plans, organises and takes responsibility for revenue raising activities • Manages logistics associated with funding arrangements

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAFIM401 Obtain revenue to support operations	CUVFIM401A Obtain revenue to support operations	Updated to meet Standards for Training Packages and clarify intent.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAFIM401 Obtain revenue to support operations

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- develop and document a plan that outlines strategies to raise revenue for a given organisation or practice
- research revenue-raising opportunities relevant to the organisation or practice
- coordinate the development of a funding proposal
- monitor and review revenue-raising 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:

- describe sources of information for potential funding
- explain typical avenues through which revenue can be raised in the relevant industry context and their typical objectives and expectations:
- outline a wide range of methods used by visual arts practitioners and organisations to generate revenue
- discuss emerging trends and different models for revenue-raising activities
- explain issues and challenges that typically arise in revenue raising activities
- explain the key obligations generally associated with funding agreements, including:
  - legal requirements to supply services as contracted and ramifications of failure to comply
  - audit of expenditure
  - 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 in creative arts industry environments. The assessment environment must include access to materials, resources and equipment needed to research funding and revenue opportunities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAIND202 Develop and apply knowledge of information and cultural services organisations

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to source, update and maintain knowledge of information or cultural services organisations.

It applies to individuals who provide a support role in organisations such as libraries, information services, galleries, museums, archives or records management.

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

Unit Sector

Industry capability - industry context

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Source and collect information	1.1 Locate information, using relevant sources and within required timeframes, on the different types of information and cultural services 1.2 Identify key organisations and collect information about the role and key services they provide seeking the support of relevant personnel where required 1.3 Identify other industries with which information and cultural services may have a relationship

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Organise collected information
2. Update and maintain information	2.1 Review industry information on an ongoing basis to ensure currency 2.2 Identify trends and emerging technologies relevant to information and cultural services sectors 2.3 Locate key information on employment and volunteer opportunities and conditions in information and cultural services and share with colleagues
3. Finalise process	3.1 Store collected and updated information in an easily accessible and retrievable format 3.2 Apply collected information to job role or when seeking employment opportunities 3.3 Seek feedback on information gathering process and note areas for future 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, 2.2, 2.3	• Identifies the main points in information about opportunities, conditions or requirements • Interprets information to identify possible links to own information needs
Writing	1.2, 1.3	• Records routine content using required formats and clear language • Updates and maintains workplace files according to requirements
Oral Communication	1.2, 2.4	• Participates in straightforward discussions regarding information, using appropriate vocabulary and style • Confirms instructions and asks questions to elicit information
Navigate the world of work	3.2	• Identifies skill and knowledge requirements for current or potential job roles
Interact with	1.2, 2.3, 2.4	• Initiates interactions with others and responds

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others		appropriately • Contributes to work discussions using accepted conventions
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2	• Plans and implements routine tasks and own workload making limited decisions on sequencing, timing and collaboration • Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAIND202 Develop and apply knowledge of information and cultural services organisations	CULIND201A Develop and apply knowledge of information and cultural services	Updated to meet Standards for Training Packages and clarify intent. Change to unit title. Minor edits to elements and performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAIND202 Develop and apply knowledge of information and cultural services organisations

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- locate and organise key information about the role and main services of organisations providing information and cultural services
- access and retrieve collected information and use it in a job role or to seek employment in the field.

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

Knowledge Evidence

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

- identify information and cultural services organisations and outline their main role in communities
- identify roles in selected information and cultural services organisations and describe skills and knowledge required
- outline typical working conditions in information and cultural services organisations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a range of current industry information sources
- appropriate technology to research and apply industry information.

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Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAIND301 Work effectively in the creative arts industry

Modification History

Release	Comments
Release 2	This version released with CUA Creative Arts and Culture Training Package version 2.0. Updated assessment conditions section. Updated modification history section to reflect changed name of training package.
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 1.0.

Application

This unit describes the performance outcomes, skills and knowledge required to work effectively in the creative arts industry. It applies to any field of the arts industry and is relevant to people in a wide range of occupations, for example, dancers, musicians, actors, cabaret performers, street performers, entertainment administrators, reviewers, film makers and public artists.

At this level, individuals are required to use some discretion and judgement and operate under broad supervision within an established framework of plans and procedures.

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

Elements *Elements describe the essential outcomes.*	**Performance Criteria** *Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Maintain currency of own industry	1.1 Identify trends in the industry using appropriate sources of information

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knowledge	1.2 Identify likely effects of industry trends on own work practices 1.3 In consultation with relevant personnel, identify and pursue learning opportunities to develop own skills and take advantage of trends and emerging technologies
2. Establish effective contractual relationships	2.1 Establish effective contractual relationships 2.2 Share information and ideas with others in ways that engender goodwill, trust and respect 2.3 Use effective negotiation techniques to identify solutions to issues 2.4 Discuss, confirm and formally document agreements and contracts with relevant personnel 2.5 Maintain contractual relationships through regular contact and effective communication
3. Complete work tasks effectively	3.1 Demonstrate a positive personal work ethic 3.2 Negotiate and agree on prioritised work tasks and established deadlines with relevant personnel 3.3 Identify and plan for factors that may affect the completion of work tasks within deadlines 3.4 Complete work tasks within deadlines taking into account organisational and regulatory requirements 3.5 Observe copyright and intellectual property obligations when using material downloaded from the internet 3.6 Follow procedures to minimise the impact of work activities on the environment 3.7 Seek feedback on own work performance from relevant personnel and adjust in order to improve 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**
Learning	1.3, 3.7	• Uses feedback from others and self-evaluation to plan strategies to improve own skills

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Reading	1.1, 1.2, 1.3, 2.4, 3.4, 3.5, 3.6	• Interprets information from a range of written sources • Identifies texts that are relevant to immediate work role
Writing	2.4, 2.5	• Contributes to documentation of contractual agreements
Oral communication	1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.2, 3.7	• Seeks the views and opinions of others • Obtains information by listening and questioning • Discusses ideas and solutions
Navigate the world of work	2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6	• Identifies and follows procedures and expectations associated with own role • Takes responsibility for meeting legal and regulatory responsibilities within scope of own role and work context
Interact with others	1.3, 2.1, 2.2, 2.3, 2.4, 2.5, 3.2, 3.7	• Builds rapport in order to establish effective work relationships
Get the work done	2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6	• Plans a range of routine tasks and achieves goals efficiently • Implements actions according to plans, making adjustments if necessary and addressing some unexpected issues • Plans and organises own workload • Collaborates and tries to identify shared goals and agreement on the best course of action • Uses the internet as a source of information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAIND301 Work effectively in the creative arts industry (Release 2)	CUAIND301 Work effectively in the creative arts industry (Release 1)	Updated assessment conditions section. Updated modification history section to reflect changed name of training package.	Equivalent unit

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Links

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Assessment Requirements for CUAIND301 Work effectively in the creative arts industry

Modification History

Release	Comments
Release 2	This version released with CUA Creative Arts and Culture Training Package version 2.0. Updated assessment conditions section. Updated modification history section to reflect changed name of training package.
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 1.0.

Performance Evidence

Evidence of the ability to:

- apply information about industry trends to own work practice
- establish work and contractual relationships
- comply with relevant regulations and organisational requirements
- prioritise work tasks
- work collaboratively.

Note: If a specific volume or frequency is not stated, then evidence must be provided for each of the above points at least once.

Knowledge Evidence

To complete the unit requirements the individual must:

- demonstrate well-developed knowledge of:
  - relationships between different sectors of the creative arts industry
  - terminology associated with own industry sector
  - issues of appropriate behaviour and ethics as they apply to key work areas
  - key roles and responsibilities in own industry sector
  - sources of industry information and ways of maintaining current industry knowledge
- describe key features of awards and conditions of employment for own work area

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- describe key aspects of the following:
  - consequences of infringing copyright
  - how copyright is enforced
  - organisations that deal with copyright
  - copyright ownership and protection
  - legal issues that affect negotiations and contracts
  - nature, role and functions of unions and employer associations
  - rights and responsibilities of employers and employees
  - work health and safety (WHS) requirements relevant to own work context
  - current and emerging technologies used in own industry sector.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- opportunities to apply negotiation techniques to solve work and contractual issues
- situations in which work performance can be monitored and learning opportunities accessed
- occasions where work tasks must be prioritised and completed within deadlines.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAPRE401 Implement preventive conservation activities

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to provide preventive care of collection material through a sound knowledge of conservation principles, practices and ethics.

It applies to individuals who apply their skills in organisations responsible for the care of cultural material, including archives, museums, libraries, galleries and cultural centres. They monitor environmental conditions, assess the condition of collection material and take action to conserve it.

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

Unit Sector

Cultural services - preventive conservation

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Monitor environmental conditions	1.1 Monitor environmental conditions according to collection needs and identify agents of deterioration affecting collection material 1.2 Control and adjust environmental conditions within scope of own role 1.3 Report serious or complex problems to relevant colleagues
2. Assess condition of	2.1 Examine and assess condition of collection material in the

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ELEMENT	PERFORMANCE CRITERIA
collection material	appropriate location, applying knowledge of deterioration patterns 2.2 Review documentation and record current condition of collection items 2.3 Consult experts for advice where necessary
3. Undertake preventive conservation	3.1 Implement preventive conservation activities according to organisational policies and procedures and within required timeframes 3.2 Research and apply best practice guidelines, cultural protocols, updated knowledge of preservation issues and techniques, and specialist conservation advice 3.3 Identify the need for assistance and consult with a specialist conservator in relation to more complex issues that arise in collection care
4. Finalise basic preservation activities	4.1 Ensure conserved collection material is returned to original location where required 4.2 Communicate conservation activity and any associated learnings with colleagues 4.3 Complete records of preservation and preventive conservation activities in an appropriate 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	2.2, 3.1, 3.2	• Critically analyses documentation from a variety of sources to determine requirements and appropriate approaches
Writing	1.3, 2.2, 4.3	• Completes relevant documentation using clear and technically specific language and terminology that succinctly communicates relevant information
Oral communication	1.3, 2.3, 3.3, 4.2	• Effectively participates in verbal exchanges using active listening and questioning to clarify and confirm information
Navigate the	2.3, 3.1, 3.2, 3.3	• Accepts responsibility and ownership for tasks and

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world of work		makes decisions on completion parameters and the need for coordination with others • Ensures knowledge of preservation and conservation issues relevant to own role is accurate, comprehensive and current • Follows organisational procedures and protocols
Interact with others	1.3, 2.3, 3.3, 4.2	• Collaborates and cooperates with others to achieve joint outcomes
Get the work done	1.1, 1.2, 1.3. 2.1, 2.2, 3.1, 3.2, 3.3, 4.1	• Determines job sequence and works logically and systematically to undertake clearly defined tasks • Makes decisions directly related to job role, seeking assistance when required • Uses digital tools to complete work tasks and access information

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
CUAPRE401 Implement preventive conservation activities	CULPRE401A Implement preventive conservation activities	Updated to meet Standards for Training Packages and clarify intent. Minor edits to elements and performance criteria.	Equivalent Unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAPRE401 Implement preventive conservation activities

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- identify changes in the condition of collection material and take appropriate routine preventive action to protect collection material from damage and potential hazards and to conserve material
- identify agents of deterioration and assess their impact on collections in a timely manner
- apply basic conservation techniques and methods that reflect current industry methods when handling equipment, tools and materials during routine examination and conservation of collection material
- demonstrate a collaborative approach to the discussion of issues, new techniques and current approaches to conservation
- record and report preservation and preventive conservation activities.

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

Knowledge Evidence

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

- describe the roles of personnel responsible for care of cultural material, including the roles of conservators and unqualified personnel
- identify sources of expert assistance on collection care
- describe the role of preventive conservation in relation to collections
- describe the critical factors contributing to deterioration of collections
- clarify the distinction between preservation, conservation and restoration
- discuss the application of cultural considerations and protocols for the handling, storage and display of collection material
- describe methods of protecting collection material from damage and potential hazards.

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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 creative arts industry environments. The assessment environment must include access to:

- relevant policies and procedures
- cultural material in an appropriate environment
- equipment, tools and materials for preventive conservation and basic preservation activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAWRT401 Edit texts

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to refine and amend text to enhance clarity of written communication, taking into account the needs of the readership, the author's intention, available resources and the type of publication.

It applies to individuals working in contexts such as book publishing, magazines and journals, corporate, online media, government, not-for-profit organisations or freelance editing.

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. Prepare to edit written content	1.1 Clarify scope of editing tasks, including timelines with relevant personnel 1.2 Determine style or tone appropriate to the publication 1.3 Identify factors that have implications for the way content will be edited 1.4 Identify enterprise or government styles guides, general and specialist dictionaries and grammar references to support editing

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ELEMENT	PERFORMANCE CRITERIA
2. Enhance clarity of written communication	2.1 Amend text to make language clear and structure logical 2.2 Check language level is appropriate to target audience 2.3 Check tone is consistent with theme and purpose of the communication 2.4 Review punctuation, grammar and syntax to ensure clarity of meaning and ease of reading 2.5 Check text for potentially offensive, defamatory or bigoted language 2.6 Identify areas where content is unclear and amend to preserve integrity of the author's voice 2.7 Amend text for consistency where additional information has been incorporated 2.8 Mark up text according to industry or enterprise procedures 2.9 Adopt safe ergonomic practices when using equipment for long periods of time
3. Finalise editing process	3.1 Check accuracy of references and organise copyright clearances as required 3.2 Finalise format and placement of visual material as required In consultation with relevant personnel 3.3 Submit final edited material to relevant personnel by agreed deadline 3.4 Evaluate editing process, assessing own performance and noting areas for future 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
Learning	3.4	• Has an awareness of self as learner and takes responsibility for learning in this routine context
Reading	1.1, 1.2, 1.4, 2.1-2.9, 3.1, 3.2	• Interprets and analyses complex texts for accuracy, clarity and appropriateness for a particular audience • Applies appropriate strategies, including proofreading

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		skills to support understanding of a range of complex texts
Writing	1.1, 1.3, 2.1-2.9, 3.1, 3.2, 3.4	• Communicates complex relationships between ideas and information with an understanding of audience or reader needs, expectations and the application of non-discriminatory language • Applies correct grammar, syntax, spelling and punctuation, and displays knowledge of appropriate publishing and presentation formats employing broad vocabulary, grammatical structure and conventions appropriate to text
Oral Communication	1.1, 3.2, 3.3	• Participates in verbal exchanges and discussions of complex ideas by using listening and questioning techniques • Uses clear language to express understandings and opinions
Numeracy	1.1	• Calculates time required for a given editing task
Navigate the world of work	2.9, 2.10	• Complies with organisational requirements in relation to document editing • Follows work health and safety (WHS) legislation as required • Checks information sources and copyright issues that contribute to generating text-based content
Interact with others	1.1, 3.2, 3.3	• Recognises and applies appropriate communication protocols in consultation with others • Presents information in a way easily understood by others
Get the work done	1.1-1.4, 2.1-2.9, 3.1-3.4	• Adopts a logical and methodical approach to the process of clarifying scope, style and possible implications for editing • Adopts a consistent approach to the process of reviewing and amending content to achieve clear language and logical structure, meeting deadlines as required • Uses standard word processing applications to write material

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
CUAWRT401 Edit texts	CUFWRT401A Edit texts	Updated to meet Standards for Training Packages. Minor edits to performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAWRT401 Edit texts

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- edit text material for publication that enhances clarity of original text while adhering closely to the author's voice
- logically structure edited material and maintain consistency when integrating additional material
- employ tone and language consistent with target audience and purpose of communication
- mark up text using industry or enterprise procedures
- employ a sound knowledge of grammar, punctuation and syntax and access relevant style guides and dictionaries
- evaluate own work and editing process 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 design principles involved in integration of visuals and text
- describe industry or enterprise text mark-up procedures
- describe copyright clearance procedures
- outline features of text that may indicate defamation, vilification or breaches of privacy
- outline health and safety requirements as they relate to working for periods of time on screens and keyboards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

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- texts appropriate for editing
- legislation and codes of practice relevant to media
- variety of information sources
- software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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CUAWRT402 Write extended stories

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Application

This unit describes the skills and knowledge required to write fully developed stories in a wide range styles in response to creative conceptualisations or project briefs that could be self-generated or developed by others.

It applies to individuals who use appropriate structures and creative narrative development techniques to write stories for print media, screen, radio, animations, e-learning resources, games, and fiction or non-fiction projects.

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. Analyse extended story writing requirements	1.1 Identify components of a storytelling creative concept, brief or project, including target audience, format, timeline and proposed outcomes 1.2 Consider factors such as style, tone and length in relation to the writing purpose 1.3 Decide on appropriate structuring technique for extended story writing task

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Discuss possible visual and aural storytelling structures with relevant personnel, if appropriate
2. Prepare to write extended stories	2.1 Research a range of creative works that may inspire story ideas to meet project requirements 2.2 Use information sources to research subject areas 2.3 Experiment with a range of narrative structures and writing styles and techniques 2.4 Develop extended ideas for characters, plots and settings 2.5 Develop complex scenarios, contexts and situations as required 2.6 Select story structure, style, techniques and content that best meet requirements of project to engage target audience 2.7 Adopt safe ergonomic practices when using screens and keyboards for long periods of time 2.8 Seek feedback from relevant personnel on proposed stories and refine approach as required
3. Draft extended stories	3.1 Draft extended stories using appropriate structuring, style and language 3.2 Use relevant formatting and presentation techniques 3.3 Proofread draft stories for appropriate grammar, punctuation and spelling 3.4 Confirm content complies with laws and codes of practice relevant to broadcasting and publication 3.5 Submit draft manuscripts to relevant personnel for feedback and amend as required
4. Write final drafts	4.1 Evaluate extended stories in line with relevant criteria 4.2 Discuss and confirm additional requirements or modifications to the story with relevant personnel 4.3 Complete necessary amendments as required within agreed timelines 4.4 Evaluate story writing process and personal performance 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	4.4	• Evaluates own performance and identifies areas for improvement
Reading	1.1, 2.1-2.3, 2.6, 3.3, 4.1, 4.3	• Interprets and analyses text such as creative concepts and briefs and research information relevant to the writing task
Writing	1.2, 1.3, 2.1-2.5, 2.8, 3.1-3.3, 4.1, 4.3, 4.4	• Considers factors such as style and structure when deciding on purpose of writing • Generates written texts, demonstrating control over a broad range of writing styles and purposes utilising correct grammar, spelling and punctuation • Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express meaning
Oral Communication	1.1, 1.4, 2.2, 2.8, 3.5, 4.2, 4.4	• Collaborates with colleagues or clients and negotiates amendments to stories • Applies listening and questioning techniques and clearly articulates personal understandings, ideas and opinions
Numeracy	1.1	• Estimates time required for a given writing task
Navigate the world of work	2.7, 3.4	• Adheres to broadcasting laws and codes of practice • Follows work health and safety (WHS) legislation as required
Interact with others	1.1, 1.4, 2.2, 2.8, 3.5, 4.2, 4.4	• Consults with relevant personnel to select most appropriate content ideas and utilises feedback to finalise content • Presents information in a way easily understood by others
Get the work done	1.1-1.4, 2.1-2.6, 2.8, 3.1-3.3, 3.5, 4.1-4.4	• Uses a combination of logical planning processes and research strategies to write and edit text-based material • Invests time in developing and shaping highly creative storytelling ideas, drawing on inspiration from reading a range of existing creative stories • Experiments with styles and elements to develop complex ideas • Uses digital tools to research, create and store information

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
CUAWRT402 Write extended stories	CUFWRT402A Write extended stories	Updated to meet Standards for Training Packages. Minor edits to performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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Assessment Requirements for CUAWRT402 Write extended stories

Modification History

Release	Comments
Release 1	This version first released with CUA Creative Arts and Culture Training Package version 2.0.

Performance Evidence

Evidence of the ability to:

- write original extended stories using a range of creative narrative styles in response to project briefs
- research information from a variety of sources relevant to project requirements
- experiment with a range of narrative structures and writing styles and techniques
- employ a sound knowledge of grammar, punctuation and spelling
- evaluate own work and writing process 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 structuring techniques appropriate to a range of extended story contexts
- compare and contrast a range of storytelling narratives, structures and formats appropriate to target audience and project purpose
- describe criteria that may be used to evaluate the story
- describe copyright clearance procedures
- outline features of text that may indicate defamation, vilification or breaches of privacy
- outline health and safety requirements as they relate to working for periods of time on screens and keyboards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

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- information about legislation and codes of practice relevant to media
- variety of information sources
- software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5

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FNSACC311 Process financial transactions and extract interim reports

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to prepare and process routine financial documents, prepare journal entries, post journal entries 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 Financial Services Training Package Companion Volume Implementation Guide or the relevant regulator for specific guidance on regulatory requirements.

Unit Sector

Accounting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 financial documents 1.2 Examine supporting documentation to establish accuracy and completeness, and to confirm authorisation by required personnel
2. Prepare and process banking and petty cash	2.1 Enter and balance deposits and withdrawals according to

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ELEMENT	PERFORMANCE CRITERIA
documents	organisational procedures 2.2 Confirm the validity of cheques and electronic payments before processing 2.3 Reconcile banking documentation against 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 payable and received invoices	3.1 Prepare invoices according to organisational policies and procedures 3.2 Check invoices against source documents for accuracy and correct identified errors 3.3 File invoices and related documents for auditing purposes
4. Prepare journals	4.1 Prepare required journal entries within organisational timeframes 4.2 Confirm authorisation of journals by required personnel, and process them according to organisational policies and procedures
5. Update financial data and systems	5.1 Post journals to ledger in line with organisational input standards 5.2 Enter data into system according to organisational input standards and allocate transactions to system and accounts 5.3 Update related systems to maintain integrity of relationships between financial systems
6. Prepare deposit facility and lodge flows	6.1 Select deposit facility appropriate to banking method to be used 6.2 Apply security and safety measures required for banking method according to organisational policies and industry and legislative requirements 6.3 Obtain and file proof of lodgement according to organisational protocols
7. Finalise trial balance and interim reports	7.1 Determine scope of any special transactions to be made, and process the transactions 7.2 Complete cash and credit journals and post to general ledger 7.3 Extract and check trial balance and prepare other required interim reports 7.4 Review trial balance and interim reports for accuracy and

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ELEMENT	PERFORMANCE CRITERIA
	completeness 7.5 Finalise and file trial balance and interim reports according to organisational and regulatory requirements

Foundation Skills

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

Skill	Description
Reading	• Analyses, matches and interprets information, paying attention to detail to identify errors
Writing	• Records information accurately using correct spelling, grammar, and terminology
Oral communication	• Uses questioning and active listening to convey and clarify information and instructions with regard to authorisations
Numeracy	• Performs mathematical calculations to check accuracy and completeness and to reconcile numerical and financial data
Navigate the world of work	• Follows industry and legislative requirements, and organisational protocols, policies and procedures relevant to own role
Interact with others	• Uses communication practices and protocols suited to gaining required authorisations
Get the work done	• Plans, organises and implements tasks according to organisational and legislative requirements • Responds to predictable routine problems by implementing standard, logical solutions • Uses the main features and functions of digital tools to complete work tasks and to access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSACC311 Process financial	FNSACC301 Process financial transactions	Elements 5 and 6 integrated into one	Equivalent unit.

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Code and title current version	Code and title previous version	Comments	Equivalence status
transactions and extract interim reports (Release 1)	and extract interim reports (Release 1)	element. Updates to other elements, performance criteria and assessment 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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Assessment Requirements for FNSACC311 Process financial transactions and extract interim reports

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- enter and balance deposits and payments
- reconcile banking documentation and process and balance petty cash transactions
- check and verify financial transaction supporting documentation
- apply security and safety measures when preparing and banking receipts
- prepare deposit facilities
- enter data into financial systems and process general and special (cash and credit) journal entries, identifying and correcting errors
- process special transactions
- prepare and authorise journals and check journal processing interim reports
- extract, check and correct a trial balance
- file documentation according to organisational and regulatory requirements.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key principles and practices of double-entry accounting and accrual accounting systems
- Range of industry-accepted accounting conventions, processes and procedures for the work tasks described in the performance evidence
- Standard industry banking procedures and guidelines, including:
  - form of ‘proof of lodgement’ for different deposit methods
  - industry-accepted security and safety precautions appropriate to banking method

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- Key features of legislative and regulatory requirements relating to processing financial transactions
- Key features of organisational policies and procedures relating to processing financial transactions, including:
  - organisational policy and procedures for preparing and processing invoices
  - organisational input standards and journal authorisation procedures
  - security procedures for handling electronic payments, cheques and cash
  - safety procedures for specific banking methods
- Key features of routine financial reports, including:
  - trial balances
  - bank account reconciliation reports
  - interim 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:

- office equipment, technology, software and consumables required to process financial transactions and extract interim reports.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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FNSACC413 Make decisions in a legal context

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to make decisions, particularly those relating to compliance issues, in a legal context. It is intended to satisfy the requirement for a course of study in commercial law at an introductory or foundation level, covering Australian legal systems and processes.

It applies to individuals who, within the scope of own responsibility, use specialised knowledge to make decisions that require consideration of the legal context.

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

Unit Sector

Accounting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Examine legal context of financial services work	1.1 Identify key features of Australian legal systems and processes relating to own role 1.2 Identify functions of courts and other regulatory bodies relating to own role 1.3 Analyse implications of related legislation, regulations and legal precedents for operational decisions, and apply findings in decision-making process 1.4 Seek advice and guidance to evaluate and moderate

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ELEMENT	PERFORMANCE CRITERIA
	decision-making processes
2. Identify compliance requirements of financial services work	2.1 Interpret compliance requirements of own financial services work, and confirm interpretation with authoritative source relating to own role 2.2 Review legislative and regulatory sources of information to identify changes to compliance requirements 2.3 Analyse impact of changes to compliance requirements on business operations, policies and procedures
3. Develop compliance procedures	3.1 Develop procedures in consultation with others to address compliance requirements 3.2 Establish timeframes to meet compliance requirements to align with statutory deadlines

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

Skill	Description
Reading	• Categorises, consolidates and interprets complex regulatory and legislative information relating to scope of own work
Writing	• Prepares documentation using clear language, formats and terminology specific to requirements, audience and purpose
Oral communication	• Participates in verbal exchanges using active listening and questioning to clarify thinking and elicit opinions of others
Navigate the world of work	• Contributes to the development of procedures to meet legislative requirements • Identifies organisational implications of new or changed legislation or regulations
Interact with others	• 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	• Organises work to meet organisational requirements, taking responsibility for process, compliance and schedule needs • Makes critical and non-critical decisions in relatively complex

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Skill	Description
	situations, taking related legislation, regulations, and legal precedents into consideration • Uses the main features and functions of digital tools to complete work tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSACC413 Make decisions in a legal context (Release 1)	FNSACC403 Make decisions in a legal context (Release 1)	Edits to performance criteria to clarify their intent. Added performance criterion to Element 2. Expanded knowledge evidence.	Equivalent unit.

Links

Companion volumes are available from VETNet. - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSACC413 Make decisions in a legal context

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- access information on legislation, statutes, regulations, and legal precedents related to operational decisions
- interpret impact of legislation, statutes, regulations and legal precedents on operational decisions regarding compliance requirements
- review, and assist in developing, organisational procedures to meet compliance requirements.

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

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of Australian legal systems and processes, and the context in which they operate, including:
  - basic principles, current statute and common law
  - roles and responsibilities of key organisations
  - constitutional considerations
  - separation of powers
  - basic principles of the law of torts, particularly relating to:
    - negligence
    - negligent misstatement
  - courts and regulatory bodies

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- Key features of current legislation and its general impact on business operations in the areas of:
  - consumer law
  - contract law
  - corporations law, including different business organisational structures and regulations for:
    - public and private companies
    - trusts
    - partnerships
    - sole traders
  - property law
  - superannuation law
  - taxation law
- Key decisions in case law and findings
-

Assessment Conditions

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

- office equipment, technology, software and consumables required to access information on Australian legal systems and processes, including:
  - access to the internet
  - legislative and regulatory documentation required for decision making in own role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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FNSACC416 Set up and operate a computerised accounting system

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Application

This unit describes the skills and knowledge required to establish, operate, and modify an integrated computerised accounting system. This is generally under supervision and encompasses processing transactions in the system, maintaining the system, producing reports, and ensuring system integrity.

It applies to individuals who, within the scope of own responsibility, use specialised knowledge, information technology, and planning and organising skills to establish and maintain an organisational system in service and trading environments.

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

Unit Sector

Accounting

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 according to organisational requirements, policies and procedures 1.2 Set up customers, suppliers and inventory items in system to meet organisational requirements and reporting requirements of goods and services tax (GST)

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify sources of technical help and use them to solve operational problems
2. Process transactions in system	2.1 Collate, code, and classify input data before processing 2.2 Process wide range of cash and credit transactions according to organisational policies and procedures 2.3 Use general journal to make balance day adjustments for prepayments and accruals 2.4 Regularly review system output to verify accuracy of data input, and make adjustments for detected processing errors 2.5 Perform end of financial year rollover
3. Maintain system	3.1 Add new general ledger accounts, and customer, supplier, inventory and fixed asset records as required 3.2 Maintain and update existing chart of accounts, and customer, supplier, inventory and fixed asset records and subsidiary accounts 3.3 Customise chart of accounts to meet reporting requirements of organisation
4. Produce reports	4.1 Generate reports to indicate financial performance and financial position of organisation and for goods and services tax (GST) purposes 4.2 Generate reports that confirm that subsidiary ledgers and accounts reconcile with general ledger 4.3 Generate reports that confirm that system’s bank account entries reconcile with bank statements 4.4 Establish systems and practices to ensure information is stored securely and according to legislative and organisational requirements 4.5 Maintain secure record of processed transactions for audit purposes

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

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Skill	Description
Reading	• Accesses, manages, and analyses financial information and data from a range of sources and reports
Writing	• 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	• Uses questioning and active listening to clarify and convey information and instructions
Numeracy	• Performs mathematical calculations and uses mathematical problem-solving strategies to analyse financial data and reports
Navigate the world of work	• Identifies and complies with legislative and regulatory requirements, protocols, policies and procedures associated with own role
Get the work done	• Organises work to meet organisational requirements, taking responsibility for process, compliance, and scheduling needs • Makes critical and non-critical decisions in relatively complex situations, taking legislative and regulatory requirements into consideration • Identifies and responds to predictable problems and implements solutions to issues that have the potential to impact on the data entry and reporting process • Implements security requirements for managing digital data

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSACC416 Set up and operate a computerised accounting system (Release 1)	FNSACC406 Set up and operate a computerised accounting system (Release 1)	Elements 4 and 5 integrated into one element. Updates to assessment requirements.	Equivalent unit.

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Links

Companion volumes are available from VETNet. - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSACC416 Set up and operate a computerised accounting system

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 3.0.

Performance Evidence

Evidence of the ability to:

- set up the chart of accounts for one organisation by modifying an established integrated financial software system
- implement an integrated computerised accounting system, ensuring integrity of the data
- process transactions in the integrated system, including:
  - BPAY
  - credit card payments
  - direct debit
  - invoices
  - petty cash
- generate reports in the integrated system over at least two reporting periods, including:
  - goods and services tax (GST) accrual report
  - payroll report
  - bank reconciliation report
  - profit and loss statement
  - balance sheet
- maintain computerised accounting system information securely.

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

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Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of desktop and cloud-based computerised accounting systems
- Key features of organisational policies and procedures relating to setting up and operating a computerised accounting system
- Key requirements of financial services industry legislation relating to information privacy when using computerised accounting systems
- Key features and characteristics of information included in source documents of financial data
-

Assessment Conditions

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

- office equipment and consumables required to operate a computerised accounting system
- technology and software required to operate a computerised accounting system, including:
  - integrated commercial financial software system and associated data
  - desktop-based and/or cloud-based computerised accounting system
  - access to the internet.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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FNSCMP501 Comply with financial services legislation

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 involved in ensuring compliance with relevant provisions in financial laws, regulations, ethics and industry codes of practice at an organisational level.

It applies to individuals with responsibility for operational aspects of laws, regulations, rules, circulars and company policies and procedures; understanding changes and implications of laws, regulations, rules and circulars; complying with any relevant codes; and maintaining statutory records.

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

Unit Sector

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 and apply organisational requirements of legal principles and regulatory obligations	1.1 Source and access documents for legislation, regulations and policies relevant to provision of financial products and services 1.2 Interpret and analyse legal principles and organisational implications relating to provision of financial products and services 1.3 Identify organisational requirements of these documents and

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ELEMENT	PERFORMANCE CRITERIA
	their impact on work practices in terms of procedural requirements 1.4 Execute the procedural requirements relating to operational aspects of laws and regulations, and codes of practice in line with organisational policy 1.5 Comply with role authorities and restrictions as identified in position profiles 1.6 Implement internal monitoring/audit program according to organisational and role requirements 1.7 Establish mechanisms to ensure maintenance and currency of regulatory literature
2. Identify changes and implications of laws, regulations, rules and circulars	2.1 Access changed legislation, regulations and policies in a timely manner 2.2 Identify and communicate changes to regulatory requirements in line with organisational policy 2.3 Review operational procedures to reflect changes to regulation and legislation 2.4 Identify implications for products and services and implement changes in accordance with client, legislative and organisational requirements
3. Comply with any relevant industry or professional codes	3.1 Source, access and apply relevant industry and professional codes of practice to own work in accordance with industry and organisational requirements 3.2 Interpret key principles and responsibilities in accordance with industry codes of practice 3.3 Confirm and clarify own interpretation and application of industry codes of practice as required with relevant persons 3.4 Understand and implement impact of codes of practice on work practices 3.5 Demonstrate a commitment to comply with industry and professional codes of practice through own ethical behaviour
4. Maintain statutory records	4.1 Maintain copies of relevant records 4.2 Keep copies of any relevant agreements on file 4.3 Maintain evidence of current authorisation, training and relevant licences in accordance with organisational, legal and regulatory requirements available

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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, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 3.4, 4.3	• Selects, interprets, synthesises and critically analyses information and data from a wide range of relevant legislation, regulation, codes of practice and organisational procedures
Writing	1.2, 2.2, 2.3, 2.4, 3.1, 3.3	• Records information accurately and drafts and revises logical and effective organisational procedures
Oral Communication	3.3, 3.5	• Participates in verbal exchanges using active listening and questioning to determine or confirm understanding • Uses language, terminology and concepts appropriate to purpose and audience
Navigate the world of work	1.1, 1.4-1.6, 2.1, 3.1, 3.2, 3.4, 3.5, 4.1-4.3	• Takes full responsibility for following policies, procedures and ethical and legislative requirements, and identifies the organisational implications of new legislation or regulation • Maintains knowledge required to carry out work role
Interact with others	1.6, 3.3, 3.5	• Selects and uses appropriate conventions and protocols when communicating with colleagues and others from diverse backgrounds to demonstrate professionalism and seek or provide information
Get the work done	1.1-1.3, 1.7, 2.1, 2.4, 3.3, 4.1-4.3	• Accepts responsibility for planning and sequencing complex tasks and workload • Plans, organises, implements and reviews systems and processes to manage compliance issues according to relevant regulations and legislation • Applies systematic and analytical decision-making processes to make recommendations in complex and non-routine situations • 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

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Code and title current version	Code and title previous version	Comments	Equivalence status
FNSCMP501 Comply with financial services legislation	FNSCMP501A Comply with financial services 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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSCMP501 Comply with financial services legislation

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:

- comply with operational aspects of industry codes, laws, regulations, rules and circulars while undertaking duties in the relevant financial services sector
- comply with the agency/broker agreement and professional indemnity obligations in the performance of a range of tasks
- maintain statutory records for a range of financial products and 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:

- analyse and explain changes and implications of key requirements of law, regulations, rules and circulars relevant to the sector or the work performed
- analyse compliance requirements of legislation, regulation and codes of practice relevant to the financial services industry sector
- describe internal compliance monitoring or audit programs
- define and explain duty of care principles
- outline the general obligations of a financial services adviser, and ethical requirements
- outline legislative and industry codes of practice to be complied with when:
  - marketing or selling the organisation’s products and services
  - handling client complaints
- analyse relevant agency agreements and/or broker authority
- identify relevant associations in the financial services industry that can provide advice on codes of 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 compliance field of work and include access to:

- common office equipment, technology, consumables and industry software packages
- financial services legislation, and industry and professional codes of practice
- organisational policy 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=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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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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FNSORG501 Develop and manage a 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 collect and analyse information and apply sound accounting principles to the development and ongoing management of a budget for a small organisation or section of a large organisation.

It applies to individuals who use a range of specialist and managerial techniques to plan, monitor and control budgetary work.

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. Plan for and collect information for budget	1.1 Determine and confirm areas for which budget is being prepared with appropriate personnel, and identify, access and analyse data required for development of budget 1.2 Determine budget parameters with estimates based on research, consultation and negotiation with appropriate personnel 1.3 Consult relevant colleagues in budget planning process as required

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ELEMENT	PERFORMANCE CRITERIA
2. Develop budget	2.1 Draft budget based on analysis of all available information in accordance with organisational policy 2.2 Identify and support income and expenditure estimates with reliable information and circulate draft budget for comment
3. Finalise budget and allocate resources	3.1 Provide final budget which incorporates agreed modifications to appropriate personnel 3.2 Inform personnel affected by budget of its limits and goals in their work area and clarify financial management and reporting responsibilities 3.3 Obtain agreement to budget priorities and allocate resources
4. Monitor and control budget	4.1 Check actual income and expenditure against budget at regular intervals, and prepare and present budget reports to appropriate personnel 4.2 Identify and respond to deviations, take appropriate action and advise relevant personnel on budget status
5. Complete financial and statistical reports	5.1 Complete all required financial and statistical reports accurately within designated timelines 5.2 Make appropriate recommendations about future financial planning 5.3 Provide clearly presented and accurate reports 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, 2.1, 2.2, 4.1, 4.2	• Extracts, analyses and monitors complex textual information from a range of sources to determine relevance, accuracy and compliance with organisational policy
Writing	1.1, 1.3, 2.1, 2.2, 3.1, 3.2, 4.2, 5.1, 5.2, 5.3	• Analyses and compiles numerical data and text information to convey specific information and recommendations accurately and effectively to others using clear and detailed language

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		• Demonstrates effective control of text types required by financial and statistical report conventions and documentation
Oral Communication	1.1 -1.3, 3.2, 3.3, 4.1, 4.2, 5.2	• Participates in verbal exchanges of information, demonstrating control of a range of oral techniques to elicit the views and opinions of others and confirm understanding • Clearly articulates requirements and outcomes using language, tone and pace appropriate to the audience and environment
Numeracy	1.1, 1.2, 2.1, 2.2, 3.1, 4.1, 4.2, 5.1, 5.3	• Interprets, analyses and uses numerically expressed data to effectively prepare, monitor, amend and present accurate budgetary information
Navigate the world of work	2.1, 3.2, 5.1	• Works independently and collectively in making decisions about budge requirements in accordance with organisational policy
Interact with others	1.1-1.3, 2.2, 3.1, 3.2, 4.1, 5.3	• Selects and uses appropriate conventions and protocols to gain and provide relevant budgetary information • Plays a lead role in situations requiring effective collaborative skills, demonstrating high level negotiation skills and ability to gather information through consultation
Get the work done	1.1, 1.2, 2.1, 3.3, 4.1, 4.2, 5.1, 5.2	• Accepts responsibility for planning and sequencing complex tasks and workload • Applies systematic and analytical decision-making processes to make recommendations in complex and non-routine situations • 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**
FNSORG501 Develop and manage a budget	FNSORG501A Develop and manage a budget	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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSORG501 Develop and manage a 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:

- collect and accurately interpret relevant data to develop and finalise a budget
- consult effectively and negotiate outcomes with others on budgetary issues
- accurately complete financial and statistical reports related to budgeting.

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:

- define basic accounting and financial services industry terminology
- outline types of data required to develop the budget
- explain accounting techniques relevant to budget preparation and maintenance
- describe budgeting techniques and tools
- describe organisational and industry policy and procedures related to budget development and management.

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:

- a range of common office equipment, technology, software and consumables
- an integrated financial software system 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=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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FNSPIM412 Participate in formal communication processes

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to use oral and written communication skills, in processes such as participation in formal meetings, interviews, formal performance appraisals and the associated writing tasks. These tasks are generally covered by accepted conventions within the personal injury management sector.

It applies to individuals who use specialised knowledge and well developed communication and interpersonal skills in their role to facilitate and complete requirements.

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

Personal injury management

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Participate in formal meetings and discussions	1.1 Follow accepted meeting procedures when participating in formal meetings 1.2 Make constructive contributions to discussion at formal meetings 1.3 Use a range of techniques to elicit information and ensure understanding of other points of view

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	1.4 Ensure minutes of meetings are recorded, if required, following accepted conventions
2. Take part in formal interviews	2.1 Clarify purpose of the interview and role in the interview process 2.2 Prepare for the interview by carrying out relevant research, formulating questions and writing an agenda/plan as required 2.3 Use effective listening and questioning techniques to receiving and giving information 2.4 Analyse information or outcomes of the interview
3. Write brief reports	3.1 Use accepted report writing conventions to produce report 3.2 Collect information on which to base the report 3.3 Write brief reports on workplace topics following accepted organisation and industry 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	2.2, 2.4, 3.2	• Collects and interprets documentation from a variety of sources and records and consolidates relevant related information
Writing	1.4, 2.2, 3.1, 3.3	• Creates a range of formal texts, following organisational procedures and protocols, using appropriate formats and structures to report and present information logically • Uses clear language, correct spelling and grammar and appropriate terminology to convey information appropriate to audience and purpose
Oral Communication	1.2, 1.3, 2.1, 2.3	• Participates in verbal exchanges using active listening and questioning and uses collaborative techniques to convey and elicit information • Uses appropriate language, concepts, pace and tone to convey information appropriate to audience and purpose
Navigate the world of work	1.1, 3.3	• Adheres to expected workplace protocols and responsibilities

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Get the work done	1.4, 3.2, 3.3, 2.2, 2.4, 3.2	• Uses digital technologies to research and to complete workplace documentation

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
FNSPIM412 Participate in formal communication processes	FNSPIM412A Participate in formal communication processes	Updated to meet Standards for Training Packages. Industry updates. 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=c7200cc8-0566-4f04-b76f-e89fd6f102fe

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Assessment Requirements for FNSPIM412 Participate in formal communication processes

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- produce accurate and clear reports
- use active listening and questioning skills in formal meetings and discussions.

Note: If a specific volume or frequency 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 main conventions for:
- writing minutes
- report writing
- explain the possible purposes for an interview and the impact this may have on the interview process
- discuss appropriate uses of different listening and questioning techniques
- describe the procedures, conventions and protocols for running meetings.

Assessment Conditions

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

- office equipment, technology, software and consumables
- organisation records, 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=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 6	Updated: • assessor requirements statement • foundation skills lead in statement • licensing statement • modification history to reflect 2012 standards Equivalent outcome.
Release 5	Updated mapping information. Changes to assessment requirements. Equivalent outcome.
Release 4	Updated mapping information. Equivalent outcome.
Release 3	Updated mapping information.
Release 2	Minor corrections to formatting to improve readability. Equivalent competency outcome.
Release 1	This version was released in *HLT Health Training Package release 1.0* and meets the requirements of the 2012 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.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes.	*Performance criteria specify the level of performance needed to demonstrate achievement of the element.*
1. Respond to an emergency situation	1.1 Recognise an emergency situation 1.2 Identify, assess and manage immediate hazards to health and safety of self and others 1.3 Assess the casualty and recognise the need for first aid response 1.4 Assess the situation and seek assistance from emergency response services
2. Apply appropriate first aid procedures	2.1 Perform cardiopulmonary resuscitation (CPR) in accordance with Australian Resuscitation Council (ARC) guidelines 2.2 Provide first aid in accordance with established first aid principles 2.3 Display respectful behaviour towards casualty 2.4 Obtain consent from casualty where possible 2.5 Use available resources and equipment to make the casualty as comfortable as possible 2.6 Operate first aid equipment according to manufacturer's instructions 2.7 Monitor the casualty's condition and respond in accordance with first aid principles
3. Communicate details of the incident	3.1 Accurately convey incident details to emergency response services 3.2 Report details of incident to workplace supervisor as appropriate 3.3 Maintain confidentiality of records and information in line with statutory and/or organisational policies

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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 describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705

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Assessment Requirements for HLTAID003 Provide first aid

Modification History

Release	Comments
Release 6	Updated: • assessor requirements statement • foundation skills lead in statement • licensing statement • modification history to reflect 2012 standards Equivalent outcome.
Release 5	Updated mapping information. Changes to assessment requirements. Equivalent outcome.
Release 4	Updated mapping information. Equivalent outcome.
Release 3	Updated mapping information.
Release 2	Minor corrections to formatting to improve readability. Equivalent competency outcome.
Release 1	This version was released in *HLT Health Training Package release 1.0* and meets the requirements of the 2012 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:

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  - performed at least 2 minutes of uninterrupted single rescuer cardiopulmonary resuscitation (CPR) (5 cycles of both compressions and ventilations) on an adult resuscitation manikin placed on the floor
  - performed at least 2 minutes of uninterrupted single rescuer CPR (5 cycles both compressions and ventilations) on an infant resuscitation manikin placed on a firm surface
  - responded appropriately in the event of regurgitation or vomiting
  - managed the unconscious breathing casualty
  - followed single rescue procedure, including the demonstration of a rotation of operators with minimal interruptions to compressions
  - followed the prompts of an Automated External Defibrillator (AED)
- Responded to at least two simulated first aid scenarios contextualised to the candidate's workplace/community setting, including:
  - conducted a visual and verbal assessment of the casualty
  - demonstrated safe manual handling techniques
  - post-incident debrief and evaluation
  - provided an accurate verbal or written report of the incident
- Applied first aid procedures for the following:
  - allergic reaction
  - anaphylaxis
  - bleeding control
  - choking and airway obstruction
  - envenomation, using pressure immobilisation
  - fractures, sprains and strains, using arm slings, roller bandages or other appropriate immobilisation techniques
  - respiratory distress, including asthma
  - shock

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the work role. This includes knowledge of:

- State/Territory regulations, first aid codes of practice and workplace procedures including:
  - ARC Guidelines relevant to provision of CPR and first aid
  - safe work practices to minimise risks and potential hazards
  - infection control principles and procedures, including use of standard precautions
  - requirements for currency of skill and knowledge
- legal, workplace and community considerations including:
  - awareness of potential need for stress-management techniques and available support following an emergency situation
  - duty of care requirements

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  - respectful behaviour towards a casualty
  - own skills and limitations
  - consent
  - privacy and confidentiality requirements
  - importance of debriefing
- considerations when providing first aid including:
  - airway obstruction due to body position
  - appropriate duration and cessation of CPR
  - appropriate use of an AED
  - chain of survival
  - standard precautions
  - how to conduct a visual and verbal assessment of the casualty
- principles and procedures for first aid management of the following scenarios:
  - abdominal injuries
  - allergic reaction
  - anaphylaxis
  - basic care of a wound
  - bleeding control
  - burns
  - cardiac conditions, including chest pain
  - choking and airway obstruction
  - crush injuries
  - diabetes
  - dislocations
  - drowning
  - envenomation
  - environmental impact, including hypothermia, hyperthermia, dehydration and heat stroke
  - eye and ear injuries
  - fractures
  - febrile convulsions
  - head, neck and spinal injuries
  - minor skin injuries
  - needle stick injuries
  - poisoning and toxic substances
  - respiratory distress, including asthma
  - seizures, including epilepsy
  - shock
  - soft tissue injuries, including strains and, sprains
  - stroke

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  - unconsciousness
- basic anatomy and physiology relating to:
  - how to recognise a person is not breathing normally
  - chest
  - response/consciousness
  - upper airway and effect of positional change
  - considerations in provision of first aid for specified conditions

Assessment Conditions

Skills must be demonstrated working individually in an environment that provides realistic in-depth, industry-validated scenarios and simulations to assess candidates' skills and knowledge.

Assessment resources must include:

- adult and infant resuscitation manikins in line with ARC Guidelines for the purpose of assessment of CPR procedures
- adrenaline auto-injector training device
- AED training device
- placebo bronchodilator and spacer device
- roller bandages
- triangular bandages
- workplace First Aid kit
- workplace injury, trauma and/or illness record, or other appropriate workplace incident report form for written reports
- wound dressings

Simulated assessment environments must simulate the real-life working environment where these skills and knowledge would be performed, with all the relevant equipment and resources of that working environment.

Assessor requirements

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705

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HLTAID005 Provide first aid in remote situations

Modification History

Release	Comments
Release 5	Updated: • assessor requirements statement • foundation skills lead in statement • licensing statement • modification history to reflect 2012 standards Equivalent outcome.
Release 4	Updated mapping information. Changes to assessment requirements. Equivalent outcome.
Release 3	Updated mapping information. Equivalent outcome.
Release 2	Minor changes to formatting to improve readability.
Release 1	This version was released in *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.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements define the essential outcomes.	*Performance criteria specify the level of performance needed to demonstrate achievement of the element.*
1. Respond to a remote emergency situation	1.1 Plan for isolated travel or work if required, accounting for expected contingencies
	1.2 Recognise an emergency situation
	1.3 Identify, assess and manage immediate hazards to health and safety of self and others
	1.4 Assess the casualty and recognise the need for first aid response
	1.5 Assess the situation and evaluate options for medical assistance
	1.6 Evaluate options for transporting casualty or waiting for medical assistance in relation to environmental issues, risks, transport availability and casualty condition
2. Apply appropriate first aid procedures	2.1 Perform cardiopulmonary resuscitation (CPR) in accordance with Australian Resuscitation Council (ARC) guidelines
	2.2 Provide first aid in accordance with established first aid principles
	2.3 Display respectful behaviour towards casualty
	2.4 Obtain consent from casualty where possible
	2.5 Use available resources and equipment to make the casualty as comfortable as possible
	2.6 Operate first aid equipment according to manufacturer’s instructions
	2.7 Monitor the casualty’s condition and respond in accordance with first aid principles
3. Manage the incident	3.1 Seek assistance from others present to manage incident circumstances
	3.2 Establish communication links with emergency response services and convey incident details
	3.3 Report details of casualty condition, changes in

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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.*
	condition, management and responses
	3.4 Assist in the evacuation of the casualty by following directions given by emergency response services as required
	3.5 Maintain confidentiality of records and information in line with statutory and/or organisational policies
4. Evaluate the incident and own performance	4.1 Recognise the possible psychological impacts on self and other rescuers involved in critical incidents
	4.2 Participate in debriefing to address individual needs

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705

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Assessment Requirements for HLTAID005 Provide first aid in remote situations

Modification History

Release	Comments
Release 5	Updated: • assessor requirements statement • foundation skills lead in statement • licensing statement • modification history to reflect 2012 standards Equivalent outcome.
Release 4	Updated mapping information. Changes to assessment requirements. Equivalent outcome.
Release 3	Updated mapping information. Equivalent outcome.
Release 2	Minor changes to formatting to improve readability.
Release 1	This version was released in *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

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  - performed at least 2 minutes of uninterrupted single rescuer CPR (5 cycles both compressions and ventilations) on an infant resuscitation manikin placed on a firm surface
  - responded appropriately in the event of regurgitation or vomiting
  - managed the unconscious breathing casualty
  - followed single rescue procedure, including the demonstration of a rotation of operators with minimal interruptions to compressions
  - followed the prompts of an Automated External Defibrillator (AED)
- Responded to at least three simulated first aid scenarios contextualised to the candidate's remote and/or isolated situation:
  - demonstrated safe manual handling techniques
  - conducted a visual and verbal secondary survey assessment of the casualty
  - assessed vital signs, including respirations, pulse and temperature
  - post-incident debrief and evaluation
  - provided an accurate verbal and written report of the incident
- Applied first aid response in a remote situation for the following:
  - allergic reaction
  - anaphylaxis
  - basic care of a wound
  - bleeding control
  - choking and airway obstruction
  - envenomation, using pressure immobilisation
  - environmental impacts, including hypothermia, hyperthermia, dehydration and heat stroke
  - fractures, sprains and strains, using arm slings, roller bandages or other appropriate immobilisation techniques
  - head, neck and spinal injuries, using immobilisation principles
  - respiratory distress, including asthma
  - shock

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the work role. This includes knowledge of:

- State/Territory regulations, first aid codes of practice and workplace procedures including:
  - ARC guidelines relevant to provision of CPR and first aid
  - safe work practices to minimise risks and potential hazards
  - infection control principles and procedures, including use of standard precautions
  - requirements for currency of skill and knowledge
- legal, workplace and community considerations including:

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  - awareness of potential need for stress-management techniques and available support following an emergency situation
  - duty of care requirements
  - respectful behaviour towards a casualty
  - own skills and limitations
  - consent
  - privacy and confidentiality requirements
  - importance of debriefing
- considerations when providing first aid, including:
  - airway obstruction due to body position
  - appropriate duration and cessation of CPR
  - appropriate use of an AED
  - chain of survival
  - standard precautions
  - how to conduct a visual and verbal secondary survey assessment
  - assessment and interpretation of vital signs, including respirations, temperature and pulse
- principles and procedures for first aid management of the following scenarios, contextualised to the candidate's remote and/or isolated situation:
  - abdominal injuries
  - allergic reaction
  - anaphylaxis
  - basic care of a wound
  - bleeding control
  - burns
  - cardiac conditions, including chest pain
  - choking and airway obstruction
  - crush injuries
  - diabetes
  - dislocations
  - drowning
  - envenomation
  - environmental impact, including hypothermia, hyperthermia, dehydration and heat stroke
  - eye and ear injuries
  - febrile convulsions
  - fractures
  - head, neck and spinal injuries
  - minor skin injuries
  - needle stick injuries

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  - poisoning and toxic substances
  - respiratory distress, including asthma
  - seizures, including epilepsy
  - shock
  - soft tissue injuries, including sprains and strains
  - stroke
  - unconsciousness
- remote considerations in the provision of first aid, including:
  - typical hazards and strategies for preparing supplies to address contingencies
  - management options relating to transporting casualty, including aero-medical evacuation
  - how to identify and prepare areas for safe evacuation, including aero-medical evacuation
  - how and when to access emergency response services
  - communication systems, equipment and methods available in remote situations
  - priorities of management in first aid when dealing with life-threatening conditions
  - specific considerations contextualised to alpine, desert, marine, rural/remote settings and tropical environments
- basic anatomy and physiology relating to:
  - how to recognise a person is not breathing normally
  - chest
  - response/consciousness
  - upper airway and effect of positional change
  - considerations in provision of first aid for specified conditions, including specific considerations for remote settings

Assessment Conditions

Skills must be demonstrated working individually in an environment that provides realistic in-depth, industry-validated scenarios and simulations to assess candidates' skills and knowledge.

- Assessment resources must include:
  - adult and infant resuscitation manikins in line with ARC Guidelines for the purpose of assessment of CPR procedures
  - adrenaline auto-injector training device
  - AED training device
  - placebo bronchodilator and spacer device
  - roller bandages
  - thermometer
  - triangular bandages
  - workplace First Aid kit suitable for remote locations

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- workplace injury, trauma and/or illness record, or other appropriate workplace incident report form
- wound dressings

Simulated assessment environments must simulate the real-life working environment where these skills and knowledge would be performed, with all the relevant equipment and resources of that working environment.

Assessor requirements

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705

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ICPDMT321 Capture a digital image

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to evaluate and use digital camera technology and alter and upload digital images.

It applies to individuals who may work in a team environment with some responsibility for producing quality outcomes based on requirements.

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

Unit Sector

Digital media technologies

Elements 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 digital camera qualities	1.1 Camera software compatibility with hardware system is assessed and appropriate software is selected for job 1.2 Pixel resolution of camera is matched to required quality and resolution of outcome 1.3 RAM capacity of camera is checked to be sufficient for number of images required to be captured 1.4 Shutter speed, focal lengths and camera feature modes are assessed as suitable for quality and use of photographic images

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ELEMENT	PERFORMANCE CRITERIA
	required 1.5 Lithium batteries are handled and stored according to work health and safety (WHS) requirements
2 Set up for image capture	2.1 Camera is set up for image composition according to job specifications 2.2 Lighting is arranged according to job specifications 2.3 Light intensity is set for correct exposure
3 Preview image	3.1 Tone curves are adjusted according to job specifications 3.2 Neutral balance of image is arranged and adjusted 3.3 Adjustments to image composition and exposure are made
4 Photograph and upload digital image	4.1 Digital camera is loaded and operated according to manufacturer's and job specifications appropriate to quality of image to be photographed 4.2 File is uploaded on to relevant computer and image saved on hard disk 4.3 Photographic image files are created and stored on computer 4.4 Photographic images are enhanced, cropped and altered electronically to deliver required image 4.5 Photographic images are checked to ensure they meet job brief 4.6 Photographic images are delivered using required delivery mode

Foundation Skills

This section 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, 2.2, 3.1, 4.1, 4.5	• Interprets textual information to determine and confirm job requirements
Writing	4.3	• Uses required conventions to name electronic files
Numeracy	1.2-1.4, 2.3	• Recognises mathematical data related to memory capacity • Uses basic mathematical calculations to select

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		appropriate camera features related to shutter speed, focal length or pixel resolutions
Navigate the world of work	1.5	• Adheres to legislative requirements related to own role with specific reference to safety
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1-4.6	• Plans and implements tasks required to complete jobs according to specifications • Assesses job requirements to make decisions related to camera settings and image outputs • Analyses image quality problems and identifies and implements appropriate correction methods • Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to produce digital images

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICPDMT321 Capture a digital image	ICPMM321C Capture a digital image	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPDMT321 Capture a digital image

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- find and use information relevant to the task from various sources
- set up a digital camera correctly and safely
- use a digital camera to:
  - preview and capture THREE digital images
  - transfer images to a computer
  - use relevant software to produce final images that meet job 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 the digital camera that impact on the quality of the photographic image
- determine the safety requirements for handling and storing lithium batteries
- explain how to transfer and store images from a camera to a computer list and describe ways that photographic images can be altered or enhanced electronically
- explain why the required delivery mode is important when preparing a photographic image.

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 digital media technologies field of work and include access to:

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- a digital camera
- computer hardware and software
- photographic equipment and materials.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICPDMT322 Edit a digital image

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to edit and manipulate an image captured using digital equipment.

It applies to individuals who prepare files for export to electronic image assembly.

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

Unit Sector

Digital media technologies

Elements 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 digital image	1.1 Digital image is opened and resolution parameters assessed against job specifications 1.2 Image is converted from Red Green Blue (RGB) to Cyan Magenta Yellow Black (CMYK) colour space 1.3 Image characteristics are evaluated for colour and tone requirements
2 Edit digital image	2.1 Suitable software is engaged to enable print image profiling and/or manipulation to suit print requirement 2.2 Image is retouched to conform with job specifications

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Local colour correction is employed to conform with job specifications 2.4 Tone correction is undertaken to conform with job specifications 2.5 Edited image is saved to conform with job specifications 2.6 Image storage requirements are identified and employed 2.7 Image is saved ready for export

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	1.1, 2.2-2.6	• Recognises and interprets textual information to determine and confirm job requirements
Numeracy	1.1	• Applies basic mathematical formulas to calculate image resolution requirements
Get the work done	1.1-1.3, 2.1-2.7	• Plans and implements tasks required to complete jobs according to specifications provided • Examines images and makes routine decisions about resolution and editing requirements • Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to edit digital images

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICPDMT322 Edit a digital image	ICPMM322C Edit a digital image	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=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPDMT322 Edit a digital image

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- interpret instructions in job specifications to determine task requirements
- open and convert an image to required colour space
- use suitable software to edit and save an image ready for export according to job 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:

- explain why some images require editing or manipulation
- explain what image profiling is and why it could be required
- explain why image storage requirements should be identified
- explain when a Joint Photographic Experts Group (JPEG) rather than a Tagged Image File Format (TIFF) would be selected as a file format
- list and describe factors which may influence the grey balance and colour in an image.

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 digital media technologies field of work and include access to appropriate image manipulation software, hardware and file storage capability.

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=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICPPRN386 Troubleshoot digital media

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to problem-solve failed digital media processes and products, involving logical systematic analysis to determine the source of a problem.

It applies to skilled individuals who may set up, operate and monitor equipment and machinery and who may have to prepare material and apply solutions to problems. They may also 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

Printing

Elements 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 substandard process performance	1.1 Operation of printing device is determined to manufacturer's specifications 1.2 Outputs are identified as consistent with normal operation by comparison to proofs, dummy copies or samples 1.3 Signs of equipment degradation and impending failure are identified and appropriate follow-up action is taken according to

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ELEMENT	PERFORMANCE CRITERIA
	workplace procedures 1.4 Equipment outputs are inspected to determine nature of the problem 1.5 Nature of substandard performance is defined and reported
2. Identify causes of substandard performance	2.1 Causes of substandard performance are identified using a process for investigation 2.2 Records are reviewed to ensure the device had been maintained according to manufacturer's specifications 2.3 Calibration records are reviewed to ensure system is within calibration 2.4 Appropriate test procedure, materials and equipment are verified 2.5 Performance tests are conducted as appropriate to investigation 2.6 Equipment and/or testing variables are analysed to develop list of possible causes of substandard performance 2.7 Causes or substandard performance are isolated using the process for investigation
3. Propose corrective action	3.1 Corrective action is proposed and trialled based on investigation 3.2 Trial data is monitored to ensure outputs are consistent with normal operation 3.3 Trial results are reviewed to confirm validity of corrective action 3.4 Workplace records are maintained 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, 2.2, 2.3, 3.3	• Recognises and interprets text to establish job requirements from information contained within relevant procedures and specifications
Writing	1.5, 2.4, 3.4	• Enters routine data associated with production

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		processes and enterprise procedures
Oral Communication	1.1, 1.5, 2.2-2.5, 3.3	• Speaks clearly using appropriate vocabulary, tone and pace to report faults and discrepancies
Numeracy	2.3, 3.2, 3.3	• Interprets and analyses a range of mathematical information that is used in familiar and routine tasks
Navigate the world of work	1.1-1.3, 2.2-2.6, 3.2-3.4	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role including knowledge of work health and safety (WHS) requirements
Interact with others	1.1, 1.5, 2.2-2.5, 3.3	• Cooperates with others as part of familiar routine activities, and contributes to specific activities requiring joint responsibility and accountability • Understands what to communicate, with whom and how, in routine work situations
Get the work done	1.1-1.5, 2.1, 2.2, 2.5-2.7, 3.1, 3.2	• Determines priorities and sequences steps involved in clearly defined, familiar tasks • Recognises and takes responsibility for addressing predictable, and some less predictable, problems in familiar work contexts • Follows routine procedures for using digital technology by reading data from electronic monitoring and control systems

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICPPRN386 Troubleshoot digital media	ICPPR386A Troubleshoot digital 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=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPPRN386 Troubleshoot digital media

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- correctly identify substandard printing performance for TWO different jobs and apply corrective solutions according to enterprise procedures and job 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:

- outline relevance and location of machine manuals, safety and other documentation, information included in these documents, and location of other sources of information
- identify output devices expected for printing performance on a particular substrate and how the same substrate can perform differently on various output devices
- explain how moisture can affect print quality and correct storage procedures for substrates
- describe different printing defects that can cause mis-calibration
- explain relevant problem-solving methodologies, including empirical, ishikawa and brainstorming
- identify relevant research techniques and online forums and networks that may assist.

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 printing field of work and include access to special purpose tools, equipment and 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=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICPPRP322 Digitise images for reproduction

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to scan images, including line-art, greyscale and colour originals.

It applies to skilled individuals working as pre-press tradespeople in the printing and graphic arts industry who design and prepare layouts and artwork, manipulate images and text, and apply solutions to a defined range of problems. They may also provide some 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

Pre-Press

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Mount original copy	1.1 Original image is scaled and identified according to job specifications 1.2 Work surfaces are cleaned and prepared to ensure images are dust free 1.3 Original image is mounted according to enterprise procedures 1.4 Work health and safety (WHS) issues are identified and correct

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ELEMENT	PERFORMANCE CRITERIA
	practices are used if solvents are applied
2 Set up scanner	2.1 Scanner is set up and calibrated according to specifications 2.2 Data from copy evaluation and aim points to suit original are entered correctly onto scanner according to specifications 2.3 Scanner software or plug-in is selected
3 Produce images	3.1 Medium being scanned is selected according to job specifications 3.2 Disk capacity is checked, where appropriate, to ensure sufficiency for the job 3.3 Processor is set and checked according to job specifications 3.4 Images are scanned as required according to job specifications 3.5 Scanned images are checked against technical specifications of job and adjustments made 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, 2.1, 2.2, 3.1, 3.3-3.5	• Recognises and interprets text to establish job requirements from information contained within relevant procedures and specifications
Numeracy	2.1	• Interprets and analyses a range of mathematical information used in familiar and routine tasks
Navigate the world of work	1.2, 1.4	• Complies with legislative requirements and follows organisational policies and procedures relevant to own role
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.5	• Determines priorities and sequences steps involved in clearly defined, familiar tasks; and identifies and assembles required resources • Takes responsibility for planning and organising own workload, and initiates standard procedures when responding to familiar problems within immediate context • Understands purposes, specific functions and key

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		features of common digital systems and tools and operates them effectively to prepare and save files in required format

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICPPRP322 Digitise images for reproduction	ICPPP322C Digitise images for reproduction	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPPRP322 Digitise images for reproduction

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- correctly use a medium to high-end full colour digital device to reproduce:
  - one line-art
  - one greyscale
  - one colour transparency (positive)
  - one colour reflective
  - one negative
  - one re-screen
- ensure job specifications and work health and safety (WHS) 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:

- identify scanner settings for various printing processes or electronic media and correctly calibrate scanner
- name primary colours and colour mixing principles
- outline variables influencing colour separation requirements
- describe importance of tone gradation and grey balance
- discuss need to apply colour correction
- describe factors influencing selection of screen ruling and dot percentage
- outline impact output resolution has on final screen ruling
- outline WHS standards for operating a scanner

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- identify manuals, safety and other documentation relevant to the task, where they are kept, the information included in these documents, and where other sources of information may be found
- identify WHS standards that relate to working for periods of time on computers.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the Pre-Press field of work and include access to special purpose tools, equipment and materials.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICPPRP397 Transfer digital files

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge needed to manipulate, delete and transfer digital files.

It requires the individual to accept, document, name, delete, archive and transfer digital files by using enterprise relevant processes. Individuals work under limited supervision and with defined procedures.

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

Unit Sector

Pre-Press

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Save digital files	1.1 Files are named using enterprise format 1.2 File is checked for use of appropriate formats required for enterprise processing 1.3 Version control is used to ensure most recent file can be accessed
2 Transfer digital files	2.1 Files to be transferred (sent or received) are selected and the

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ELEMENT	PERFORMANCE CRITERIA
	correct method of transfer is chosen 2.2 Locations where files are to be saved or downloaded are accurately located and navigated 2.3 Files are transferred to required location for processing 2.4 Transferred (sent or received) files are checked to ensure correct transfer has occurred 2.5 Files are documented, moved, renamed, copied, archived and deleted as necessary according to enterprise standards
3 Retrieve and manage digital files	3.1 Required files are retrieved and opened from digital file system 3.2 Computer search functions are used to locate and retrieve files 3.3 File is sent to required location
4 Archive digital files	4.1 Archive system is created according to enterprise protocol 4.2 Consistent, regular backup strategies are undertaken to allow for retrieval of files if there is a data loss event 4.3 Files are retrieved from archive 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	1.2, 2.5, 3.2, 4.3	• Recognises and interprets texts from a range of sources
Writing	1.1, 1.3, 2.5, 4.1	• Chooses appropriate text type to document relevant information
Navigate the world of work	1.1, 1.2, 4.1	• Interprets and follows organisational policies and procedures relevant to own role
Get the work done	1.2, 1.3, 2.1-2.5, 3.1-3.3, 4.1-4.3	• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency and uses analytical processes to decide on a course of action • Plans, identifies and assembles resources required to complete tasks

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		• Responds to predictable problems and implements standard or logical solutions • Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to create and save files in required format

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICPPRP397 Transfer digital files	ICPPP397A Transfer digital files	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPPRP397 Transfer digital files

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- manipulate, delete and transfer digital files by using enterprise-determined protocols
- locate and use information relevant to the task from a variety of information sources.

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

Knowledge Evidence

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

- name enterprise file format standards
- explain differences in storage media, specifically:
  - optical
  - flash
  - magnetic
- explain file transfer protocols for:
  - Universal Serial Bus (USB)
  - FireWire
  - Asymmetric Digital Subscriber Line (ADSL) wireless
  - email attachment
  - ethernet
- outline file compression methods and explain the effect on file type required for enterprise processing
- identify file formats and sizes, and their effect on Random Access Memory (RAM) requirements, storage, processing and transfer protocols
- describe work health and safety (WHS) standards that relate to working for periods of time on computers.

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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 Pre-Press field of work and include access to special purpose tools, equipment and industry software packages.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICPPRP422 Digitise complex images for reproduction

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to undertake advanced, complex colour scanning or digital capture.

It applies to individuals who work in the graphic pre-press sector of the printing and graphic arts industry. They are responsible for image production that meets the technical specifications of the job.

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

Unit Sector

Pre-Press

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1 Mount and prepare original copy	1.1 Copy is mounted and positioned according to scanner/artwork specifications 1.2 Crops are marked to minimise use of disk space 1.3 Multiple copy units are correctly identified and assigned according to technical specifications
2 Set up and adjust scanner	2.1 Scanner is calibrated and program set according to job specifications

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Colourcast and catch lights are assessed to ensure image is scanned according to job specifications 2.3 Adjustments are made to tone and colour correction requirements 2.4 End points are set 2.5 Scanner settings are utilised to achieve required results for varied print processes
3 Produce and evaluate complex images	3.1 Images are scanned using appropriate software commands and scanner controls 3.2 Scanned images are evaluated for colour and grey balance, tone reproduction, cast removal and end-point accuracy 3.3 Images are stored on file and displayed on a monitor or output device according to job 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, 1.3, 2.1, 2.2, 3.3	• Recognises and interprets text to establish job requirements from information contained within relevant procedures and specifications
Get the work done	1.1-1.3, 2.1-2.5, 3.1-3.3	• Takes responsibility for planning and organising own workload using analytical processes to decide a course of action, and assembles required resources • Recognises and takes responsibility for addressing predictable, and some less predictable, problems in familiar work contexts • Utilises a broad range of digital software features for specific purposes

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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICPPRP422 Digitise complex images for reproduction	ICPPP422C Digitise complex images for reproduction	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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Assessment Requirements for ICPPRP422 Digitise complex images for reproduction

Modification History

Release	Comments
Release 1	This version first released with ICP Printing and Graphic Arts Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- safely use a medium to high-end full colour scanner (with full software capabilities) to reproduce at least TWO colour continuous tone originals with different contrast characteristics and ONE rescreen
- provide high-quality colour, grey balance, tone reproduction and cast removal in scanned images
- match technical aspects of scanned image to selected printing process and substrate
- safely operate and monitor production on a flat-bed or drum scanner with full colour capabilities
- find and use information relevant to the task from a variety of information sources.

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

Knowledge Evidence

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

- explain why scanner settings need to be varied to suit subsequent printing processes or electronic output
- list factors that influence selection of highlight and shadow aim points
- describe critical qualities of a copy that need evaluation prior to reproduction
- explain main points to be considered when preparing a copy for scanning
- describe how grey balance requirements are determined prior to applying colour correction
- describe factors that determine requirement for colour correction
- describe purpose of catchlight controls and how they are applied
- describe considerations necessary to ensure predictability and repeatability at the output stage

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- list methods of storage and filing of images for retrieval
- explain criteria used for evaluating scanned images
- explain how common file formats relate to the scan saving process
- identify other file formats available for saving scans and when they are used
- identify manuals, safety and other documentation relevant to this task and where are they kept, and information included in them
- identify other sources of available information.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the Pre-Press field of work and include access to:

- a flat-bed or drum scanner with full colour capabilities
- industry software packages.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d

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ICTGAM504 Manage interactive media production

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 manage interactive media or game production.

It applies to individuals who manage personnel in the interactive media or game development industry who may be concept artists, designers, programmers, animators and others.

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

Unit Sector

Game 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. Attend to the placement of staff for a digital media production	1.1 Undertake the work placement of a production team 1.2 Ensure punctuality and appropriate dress 1.3 Follow organisational guidelines to support workplace culture, and the corporate image
2. Monitor workplace structure and staff responsibilities	2.1 Identify the duties carried out by various personnel 2.2 Observe the lines of reporting and communication 2.3 Determine the responsibilities of own area or department

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ELEMENT	PERFORMANCE CRITERIA
3. Identify appropriate behaviours and attitude	3.1 Apply communication skills to interact effectively with other staff and clients 3.2 Demonstrate behaviour that reflects the organisational culture
4. Carry out tasks within the range or context specified for the workplace	4.1 Complete set tasks according to instructions and deadlines 4.2 Discuss any problems or concerns with assigned work with the supervisor or a mentor
5. Report on workplace experience	5.1 Maintain a log book that records daily activities 5.2 Complete a short report of the work experience

Foundation Skills

This 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	• Interprets and comprehends instructions, including textual and diagrammatic information to inform job requirements
Writing	1.3, 3.1, 5.1, 5.2	• Uses correct spelling and grammatical structures, clear language, and technical terminology when recording activities and writing reports
Oral Communication	3.1, 4.2	• Elicits information using effective listening and open questioning techniques • Speaks clearly and concisely, converting highly technical language and terminology to plain English, when providing information
Navigate the world of work	1.1-1.3, 2.1-2.3	• Draws on a repertoire of experience to facilitate understanding of the culture and the environment
Interact with others	1.2, 1.3, 3.1, 3.2, 4.2	• Cooperates and collaborates with others as part of routine activities, and to elicit support and feedback • Collaborates with others sharing information to build strong connections, demonstrating behaviours reflective of organisational culture
Get the work done	4.1, 5.1, 5.2	• Plans, organises and completes work according to defined requirements and schedules, taking responsibility for decisions, and scheduling tasks to

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		achieve efficient outcomes • Responds intuitively to problems requiring immediate resolution, drawing on past experiences to focus on the cause of a problem rather than the symptom

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTGAM504 Manage interactive media production	ICAGAM504A Manage interactive media 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=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTGAM504 Manage interactive media production

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:

- monitor behaviour of self and others to ensure compliance with the workplace culture
- operate according to the lines of reporting and required method of communication
- allocate tasks to appropriate staff members
- plan and complete assigned tasks in a production environment, to meet deadlines
- demonstrate effective communication, listening and questioning skills with various people, including use of industry terminology.

Note: If a specific volume or frequency 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 3-D techniques
- explain the budgeting and scheduling considerations for 3-D design
- discuss capabilities and constraints of 3-D packages
- outline current game-play hardware and software products
- discuss the technical constraints that hardware or software imposes on graphics and visual design
- explain the process required to produce a 3-D animation sequence or components
- summarise the roles and responsibilities of team members producing 3-D animations and digital effects
- summarise effective strategies for communicating with production teams and clients.

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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 game development field of work, and include access to:

- an environment where interactive media production may be carried out
- organisational guidelines and policies
- relevant people.

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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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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ICTICT104 Use digital devices

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 use a range of digital devices, such as a digital camera, video camera, or personal digital assistant (PDA) device.

It applies to individuals who require entry level information and communications technology (ICT) knowledge and literacy skills to support their work in a home office or small office environment.

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. Prepare to use the digital device	1.1 Review the instruction manual and ensure identified components are available 1.2 Identify the physical components of the digital device 1.3 Turn on and follow access procedures to activate the digital device 1.4 Alter the digital device settings to best suit intended use 1.5 Configure power management settings where appropriate to

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ELEMENT	PERFORMANCE CRITERIA
	minimise power consumption, as an environmentally sustainable measure
2. Set up and use the digital device	2.1 Identify and set the basic operating, security and menu settings 2.2 Navigate and manipulate the screen environment 2.3 Customise screen icons and access to applications where applicable 2.4 Use the digital device, and save and edit output where applicable 2.5 Identify more advanced features available and use as required
3. Access and use basic connectivity devices	3.1 Connect to external digital devices, such as computer devices or storage devices, to retrieve, copy, move and save information 3.2 Check physical connectivity of computer devices or storage devices to ensure operation and performance 3.3 Connect to a printer either through a computer device or directly, and use printer settings and print data 3.4 Access audio-visual devices to view and play a multimedia file
4. Shut down digital device	4.1 Save current work and back up important data 4.2 Close open programs on the digital device and any computer device or storage device 4.3 Shut down digital devices, according to manufacturer 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	1.1-1.5, 2.1-2.5, 3.1, 3.4, 4.3	• Reviews on-line and hard-copy text, and interprets and comprehends symbols, text, numbers and letters to determine and adhere to requirements

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Get the work done	1.1-1.5, 2.1-2.5, 3.1-3.4, 4.1-4.3	• Understands the purposes, specific functions and key features of common digital systems and tools, and operates them effectively to complete routine tasks • Plans a range of routine tasks with familiar goals and outcomes

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTICT104 Use digital devices	ICAICT104A Use digital devices	Updated to 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 ICTICT104 Use digital devices

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:

- turn on a digital device
- use the menu features and navigate a graphical user interface
- use device features to perform tasks
- save the results of 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 :

- outline the capabilities and connectivity requirements of relevant:
  - audio-visual devices
  - peripheral devices
  - storage devices
- list basic security functions
- explain basic software operation and associated applications
- explain digital device functions
- explain digital device settings.

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:

- digital devices

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- computer
- storage devices
- printer
- device-specific application currently used in 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=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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ICTICT204 Operate a digital media technology package

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 use a digital media package and supporting technologies to produce a variety of media rich documents.

It applies to individuals who may work under supervision within a small to large office environment and have responsibility for completion of designated tasks, using a range of practical skills and basic technical knowledge.

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. Identify and select	2.1 Identify the basic requirements of a design brief, including

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ELEMENT	PERFORMANCE CRITERIA
appropriate digital media package	user environment 2.2 Research and review suitable available digital media packages 2.3 Select an appropriate digital media package to meet design brief requirements
3. Use digital media package	3.1 Procure or create suitable data to meet requirements of the brief 3.2 Manipulate data using digital media package tools 3.3 Ensure naming and storing of documents in appropriate file format in directories or folders
4. Review digital media design	4.1 Evaluate design for creative, dramatic and technical quality, file size, and suitability to meet the brief 4.2 Test and run any incorporated graphics, video or sound as part of a digital media presentation and present designs in the appropriate format 4.3 Review final product against design 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	2.1, 2.2, 3.1, 3.3, 4.3	• Recognises and interprets textual and diagrammatic information to select appropriate digital media packages • Interprets systems related icons, text and diagrams
Writing	3.1-3.3	• Enters written and verbally received information and data into a format suitable for the digital media package • Selects vocabulary, syntax, terminology, labelling and naming conventions to meet program and design requirements
Numeracy	3.1, 3.2	• Adds and subtracts whole numbers, fractions and decimals to calculate time, audio output, graphic dimensions and file size
Navigate the world of	1.1	• Takes some personal responsibility for adherence to legal and regulatory requirements

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work		
Get the work done	1.1-1.3, 2.1- 2.3, 3.1-3.3, 4.2	• 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**
ICTICT204 Operate a digital media technology package	ICAICT204A Operate a digital media technology package	Updated to 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 ICTICT204 Operate a digital media technology package

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:

- interpret basic requirements of a design brief
- use digital media package to meet 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 when appropriate
- use digital media technologies to support design brief 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 the basic principles of visual design
- outline the functions and features of digital media packages and technologies
- identify graphic design and stylistic language conventions
- outline WHS principles and responsibilities for ergonomics, such as work periods and breaks
- outline the principles of digital imaging and file formats, video and sound file formats, file management and transfer systems
- identify vendor product directions in digital media hardware and software
- explain how to visualise and interpret creative information, scripts (text) and images.

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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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ICTICT308 Use advanced features of computer applications

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 use computer applications employing advanced features. It involves manipulating data and accessing support resources to solve routine problems.

It applies to individuals who have achieved a degree of autonomy as advanced information and communications technology (ICT) users, and support information technology activities in software applications.

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. Manipulate data	1.1 Employ advanced features of applications in the preparation and presentation of data 1.2 Transfer data between applications, linking and embedding related data files as required 1.3 Create and employ objects, macros and templates for routine activities

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Use shortcuts and features to increase personal productivity
2. Access and use support resources	2.1 Solve routine problems using support resources 2.2 Use online help to overcome difficulties with applications 2.3 Solve problems with manuals and training booklets 2.4 Access and apply technical support for system problems, using troubleshooting results and alert messages

Foundation Skills

This 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	• Identifies and interprets a variety of hard copy, online and software generated technical information containing software specific language, syntax and code to apply features and functions of applications to their fullest extent and to solve problems
Oral Communication	2.1, 2.4	• Discusses and resolves problems using technical terms and language, and effective listening and questioning techniques
Get the work done	1.1-1.4, 2.1-2.4	• Understands key principles and concepts underpinning the design and operation of digital systems and tools, and applies these when troubleshooting existing technology

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
ICTICT308 Use advanced features of computer applications	ICAICT308A Use advanced features of computer applications	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for ICTICT308 Use advanced features of computer applications

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:

- use at least three computer applications employing advanced features and import and export capacities for efficiency and productivity purposes
- solve routine problems using support resources.

Knowledge Evidence

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

- outline the basic features and functions of relevant operating systems software and system tools
- outline relevant vendor product directions in computer applications
- identify commonly available vendor applications and their features.

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 advanced features of computer applications may be used
- computer applications currently used in industry
- documents or information containing data suitable to demonstrate advanced features of computer applications
- support resources, including online, manuals and training booklets.

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=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

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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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ICTSAS410 Identify and resolve client ICT problems

Modification History

Release	Comments
Release 1	This version first released with ICT Information and Communications Technology Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to record and prioritise client support activities, determine the required resources, solve client information and communications technology (ICT) problems or escalate as necessary.

It applies to experienced individuals who apply specialised and technical knowledge and have responsibility for providing support to end users.

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. Determine client problems	1.1 Determine client problem by using questioning or other techniques 1.2 Document responses of client for follow-up action 1.3 Examine logged requests to determine specific requirements 1.4 Take action where required to gain further information 1.5 Refer to a database of known problems to identify possible

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ELEMENT	PERFORMANCE CRITERIA
	resolution options
2. Prioritise client problems	2.1 Determine scale of the problem based on information gathered 2.2 Establish and record relevant constraints 2.3 Undertake an impact analysis of the problem to determine severity and risks 2.4 Prioritise problem according to organisation's escalation procedures 2.5 Provide advice and support to the client from database of known problems, where appropriate
3. Refer problems where required	3.1 Investigate and apply appropriate process to follow when referring problems to third parties 3.2 Provide third party with client and problem details as required 3.3 Document advice and support provided by third party according to organisational guidelines, where appropriate
4. Carry out maintenance	4.1 Obtain appropriate components for resolution in line with organisational guidelines 4.2 Complete maintenance in line with organisational guidelines 4.3 Store or dispose of used components following organisational environmental guidelines
5. Prepare maintenance report	5.1 Prepare a maintenance report, including information about problems and resolution action 5.2 Forward maintenance report to client for feedback
6. Confirm problem resolution	6.1 Obtain feedback from client to ensure requirements have been met 6.2 Forward client feedback to appropriate person for sign-off and record in known problems database 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

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Reading	1.3, 1.5, 2.2, 6.1, 6.2	• Interprets technical specifications and numerical data from a range of documentation and sources to assist in rectifying problems
Writing	1.2, 2.2, 2.5, 3.2, 3.3, 5.1	• Uses clear language and formats appropriate for the audience to convey explicit technical information, requirements and recommendations
Oral Communication	1.1, 2.5, 3.2, 5.2, 6.1	• Uses inclusive questioning techniques to obtain information from clients and provides clear and precise advice and information to others
Navigate the world of work	1.4	• Develops and maintains knowledge relevant to work role
Interact with others	1.1, 2.5, 5.2, 6.1, 6.2	• Selects and uses appropriate conventions and protocols when communicating with client and others in a range of work contexts
Get the work done	1.1, 1.4, 1.5, 2.1-2.4, 3.1-3.3, 4.1-4.3	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Uses formal analytical thinking techniques for identifying issues and generating possible solutions, seeking input from others as required • Uses 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**
ICTSAS410 Identify and resolve client ICT problems	ICASAS410A Identify and resolve client IT problems	Updated to meet Standards for Training Packages. Minor edit to the competency title.	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 ICTSAS410 Identify and resolve client ICT problems

Modification History

Release	Comments
Release 1	This version first released with ICT Information and Communications Technology Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- record and prioritise client support activities
- determine required resources
- resolve client problems or escalate according to organisational guidelines or practices
- prepare maintenance report
- seek and record client feedback.

Note: Evidence must be supplied for at least two client support activities.

Knowledge Evidence

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

- describe hardware and software products:
  - currently in use
  - supported by the organisation
- outline sustainable practices consistent with information and communications technology (ICT) industry
- explain help desk or service desk structure and escalation procedures
- describe key functions and basic features of operating system
- describe organisational structure of workplace
- discuss principles of equal employment opportunity and anti-discrimination relating to client ICT problems
- relating to client ICT problems
- outline workplace security and network guidelines and procedures.

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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:

- special purpose tools, equipment and materials
- industry software packages
- sites with a representative range of current industry-standard hardware, software and diagnostic tools
- technical records
- organisational guidelines
- vendor 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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ICTWEB417 Integrate social web technologies

Modification History

Release	Comments
Release 1	This version first released with ICT Information and Communications Technology Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to successfully develop and integrate social networking code into new and existing websites.

It applies to individuals working as web developers who apply a wide range of knowledge and skills across a range of general information and communications technology (ICT) environments and support small to medium enterprises (SMEs) that require broader, rather than more specialised, ICT support.

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. Analyse the specifications and requirements	1.1 Evaluate different popular social networking websites 1.2 Discuss the benefits of social networking in websites 1.3 Discuss the negative aspects of social networking 1.4 Define goals, based on the client requirements, for successful social networking integration

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ELEMENT	PERFORMANCE CRITERIA
2. Develop the code and documentation	2.1 Develop the guidelines for implementing social networking in a website 2.2 Develop the code to integrate a social networking website, into a pre-existing website 2.3 Use the pre-existing scripts and tools, to integrate a social networking website into a pre-existing website
3. Validate the integration	3.1 Validate social networking integration 3.2 Validate the performance of the social networking integration in different browsers, checking compatibility and display

Foundation Skills

This section describes language, 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, 3.2	• Analyses and consolidates information and data, from a range of sources, against the defined criteria and requirements, and checks for accuracy and completeness
Writing	1.4, 2.1, 2.2	• Develops clear and well-organised material for a specific audience, using precise language to convey explicit information requirements and recommendations
Oral Communication	1.2, 1.3	• Determines and confirms client requirements using collaborative and inclusive techniques, including active listening and questioning, and reading of verbal and non-verbal signals, to convey and clarify information and to confirm understanding
Interact with others	1.2, 1.3	• Selects and uses the appropriate conventions and protocols, when communicating with clients in a range of work contexts
Get the work done	1.1, 1.4, 2.1-2.3, 3.1, 3.2	• 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

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		situations • Addresses less predictable problems and initiates standard procedures in response to these problems, applying problem-solving processes in determining a solution • Uses familiar digital technologies and systems, to access information, search and enter, data and code, present information and communicate with others, cognisant of data security and safety

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTWEB417 Integrate social web technologies	ICAWEB417A Integrate social web technologies	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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Assessment Requirements for ICTWEB417 Integrate social web technologies

Modification History

Release	Comments
Release 1	This version first released with ICT Information and Communications Technology Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- analyse requirements for the integration of a social networking website into a pre-existing website
- determine the content management functionality, against current programming and security standards
- select an appropriate social networking platform
- develop and implement, social networking integration codes into an existing website
- validate frontend code markup, against the standards set by the World Wide Web Consortium (W3C).

Note: If a specific volume or frequency 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 markup language and its associated standards
- summarise server-side language
- describe the advantages and disadvantages, of integrating social networking into web sites.

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:

- client requirements

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- a text editor
- a range of browsers
- the internet for research
- application programming interface (API) 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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ICTWEB418 Use development software and ICT tools to build a basic website

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 build a basic website, consistent with the design, technical requirements and expectations, of a client's business, using current industry software and tools.

It applies to individuals working as web developers who use a wide range of knowledge and skills across a range of general information and communications technology (ICT) environments, and support small to medium enterprises (SMEs) that require broader, rather than more specialised, ICT support.

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. Select and analyse the website structure and development tools	1.1 Analyse the business specification, and select the appropriate software 1.2 Identify the website's technical needs, and select the appropriate software tools

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify the site's structure and navigation flow, and demonstrate an understanding of functionality 1.4 Review the design documentation, and integrate the design work with the site's structure and navigation, according to web development standards
2. Begin site construction	2.1 Take action to ensure user input during website construction 2.2 Validate the existing information and basic content, when incorporating data on the website 2.3 Apply consistent design specifications to all aspects of the website 2.4 Gather feedback from the user on web design, content, accessibility and structure, using the appropriate feedback mechanism
3. Complete and validate the website construction and content	3.1 Undertake an evaluation of the website, against the technical requirements and the design specification 3.2 Test each function, and, process of the website 3.3 Conduct navigation tests and hypertext markup language (HTML) compliance with website standards 3.4 Stress test the website to meet the design criteria and user load 3.5 Record testing results to ensure that the website meets user requirements 3.6 Obtain the sign-off and approval of the user

Foundation Skills

This section describes language, 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	• Critically analyses complex documentation from a variety of sources, and consolidates information relating to specific criteria to determine requirements
Writing	2.1, 2.4, 3.5, 3.6	• Prepares and produces dynamic material for a specific audience, using clear and detailed language in order to convey explicit information, requirements and recommendations

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Oral Communication	2.1, 2.4, 3.6	• Uses collaborative and inclusive techniques, including active listening and questioning, and reading of verbal and non-verbal signals, to convey and clarify information, and to confirm understanding
Navigate the world of work	1.4, 3.3	• 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 standards
Interact with others	2.1, 2.4, 3.5, 3.6	• Selects and uses appropriate conventions and protocols, when communicating with clients in a range of work contexts • Uses a range of strategies, to establish a sense of connection, and to build rapport with clients and co-workers • Elicits and provides feedback to others
Get the work done	1.1-1.4, 2.2, 2.3, 3.1-3.4	• 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 • Addresses less predictable problems and initiates standard procedures in response to these problems, applying problem-solving processes in determining a solution • Uses familiar digital technologies and systems, to access information, search and enter data, and code, present information and communicate with others, cognisant of data security and safety

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTWEB418 Use development software and	ICAWEB418A Use development software and	Updated to meet Standards for Training	Equivalent unit

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Code and title **current version**	**Code and title** **previous version**	**Comments**	**Equivalence status**
ICT tools to build a basic website	IT tools to build a basic website	Packages. Minor change to 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 ICTWEB418 Use development software and ICT tools to build a basic website

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:

- conduct an assessment of, and document the specifications relating to, the client's website needs
- build a basic website according to client specifications
- validate the final web design against the client's requirements
- confirm and obtain client sign off.

Note: If a specific volume or frequency 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 a basic knowledge of:
  - design principles
  - the issues around accessibility and equity principles, when building for diverse users
- identify and describe the software, and tools, that are used in website development
- outline the general principles of the standard generalised markup language (SGML), and associated documentation standards
- outline the principles of website design
- describe the technical attributes specific to the web
- describe and apply, the types of code used in the generation of web sites.

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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:

- basic website specifications and guidelines
- the website development software and tools
- an internet server
- organisational and industry standards.

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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ICTWEB420 Write content for web pages

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 write concise, and clear, content for web pages on behalf of a client.

It applies to individuals who are proficient communicators in the web development field.

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. Prepare to develop content for the site	1.1 Identify customer information needs, with reference to the audience, site functionality and client requirements 1.2 Confirm site purpose and functionality, with reference to client specification 1.3 Select content channels and format as part of client requirements 1.4 Obtain the templates and style guides 1.5 Identify the content and analyse with reference to audience

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ELEMENT	PERFORMANCE CRITERIA
	needs, maintenance requirements, information architecture, and site design and functionality 1.6 Negotiate any alterations to site design, as required by the content and by client requirements
2. Write the site content	2.1 Create the content according to content and client requirements 2.2 Establish that the content is easily and conveniently, accessible and visible, and that information is clear, understandable, and logical 2.3 Edit the content with reference to audience needs, site functionality, content and client requirements
3. Upload the content	3.1 Log into the server site, using either the administrative or anonymous file transfer protocol in preparation for upload 3.2 Launch the transfer file transfer protocol (FTP) client, and navigate to the destination directory, either graphically or by using a command line interface 3.3 Store and order the files according to logical design and user needs, using an accepted file extension scheme 3.4 Demonstrate the operation in closed contention mode

Foundation Skills

This section describes language, 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, 3.1-3.3	• Reads and interprets specifications, computer program interface and other documentation, from a variety of sources, and consolidates information, to determine requirements
Writing	1.2, 1.6, 2.1, 2.3, 3.1-3.3	• Writes, edits and proofreads documents for internet use, to ensure clarity of meaning, and accuracy and consistency of information
Oral Communication	1.1, 1.2, 1.6	• Determines and confirms client requirements, using collaborative and inclusive techniques, including active listening and questioning, and reading of verbal and non-verbal signals, to convey and clarify information, and to confirm understanding

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Get the work done	1.1, 1.3-1.5, 2.2, 2.3, 3.1-3.4	• 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 • Uses familiar digital technologies and systems to access information, search and enter, data and code, present information, and communicate with others, cognisant of data security and safety

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
ICTWEB420 Write content for web pages	ICAWEB420A Write content for web pages	Updated to 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 ICTWEB420 Write content for web pages

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:

- write content for web pages that recognises cultural differences and diversity, in developing website content
- upload content for a website
- remove content on a 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:

- outline content features, including clarity, ease of viewing and readability
- explain copyright and intellectual property legislation, relating to web page content
- summarise the document design, web design and usability
- discuss the functions and features of:
  - micro-content elements, such as headings, highlighted words and link text
  - style guides, such as cascading style sheets (CSS)
- explain the information architecture
- summarise the instructional design principles
- outline the obligations of merchants and service providers
- outline the organisational requirements relating to web page content and user diversity
- explain privacy requirements relating to web page content.

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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:

- copy edit resources
- culturally reviewed content
- style guides and templates
- the website specifications
- word-processing and web development software
- the organisational documentation, and industry requirements.
-

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2

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MEM13001B Perform emergency first aid

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit covers performing basic emergency first aid, EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation).

Application of the Unit

Application of the unit	This unit applies to administration of basic emergency first aid treatment and the management of life threatening situations where an unconscious person requires expired air resuscitation (EAR) and cardiopulmonary resuscitation (CPR). This unit does not meet all of the requirements expected of designated First Aid Officers. The competencies required for situations involving isolation of persons from hazardous electrical situations are covered in Unit MEM18049C (Disconnect/reconnect fixed wired equipment up to 1000 volts a.c. and 1500 volts d.c.) and Unit MEM10003B (Install and test electrical wiring and circuits up to 1000 volts a.c. and 1500 volts d.c.). **Band**: **A** **Unit Weight**: **1**

Licensing/Regulatory Information

Not Applicable

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Perform emergency first aid	1.1. Correct procedures for EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation) are demonstrated on a mannequin. 1.2. First aid treatment of injuries is carried out correctly. 1.3. Details of first aid administered are accurately recorded. 1.4. Understanding of relevant regulatory and legislative requirements is demonstrated.

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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

Look for evidence that confirms skills in:

- planning and sequencing operations
- checking and clarifying task-related information
- performing EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation) on a mannequin
- simulated first aid treatment for the full range of injuries covered by the range statement
- reading, interpreting and following emergency first aid procedures and related documents
- entering information onto proformas and other relevant documents
- communicating effectively with injured persons, appropriate personnel and authorities

Required knowledge

Look for evidence that confirms knowledge of:

- applicable regulatory and legislative requirements
- use and application of any applicable personal protective equipment
- hazards and control measures associated with performing emergency first aid, including housekeeping
- instances where EAR and CPR should be performed
- procedures for preparing a person for the administration of EAR and CPR
- procedures for performing EAR and CPR on a child and an adult
- dangers and precautions to be taken when administering EAR and CPR
- emergency first aid procedures for injuries covered by the scope of this unit
- details to be recorded of first aid administered
- procedures and reasons for recording first aid administered
- relevant regulatory and legislative requirements with respect to emergency first aid
- the impact of regulatory/legislative requirements on the individual and others
- safe work practices and procedures

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Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	A person who demonstrates competency in this unit must be able to perform emergency first aid.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessors must be satisfied that the candidate can competently and consistently perform all elements of the unit as specified by the criteria, including required knowledge, and be capable of applying the competency in new and different situations and contexts.
Context of and specific resources for assessment	This unit may be assessed on the job, off the job or a combination of both on and off the job. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by an individual working alone or as part of a team. The assessment environment should not disadvantage the candidate. This unit could be assessed in conjunction with any other units addressing the safety, quality, communication, materials handling, recording and reporting associated with performing emergency first aid or other units requiring the exercise of the skills and knowledge covered by this unit.
Method of assessment	Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including direct observation, supervisor's reports, project work, samples and questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.
Guidance information for assessment	

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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.	
Injuries	Burns/scalds, fractures, cuts and abrasions, poisoning, foreign bodies in eyes, concussion and shock

Unit Sector(s)

Unit sector	

Co-requisite units

Co-requisite units		

Competency field

Competency field	Occupational health and safety

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MSMENV472 Implement and monitor environmentally sustainable work practices

Modification History

Release 1. Supersedes and is equivalent to MSAENV472B Implement and monitor environmentally sustainable work practices

Application

This unit of competency covers the skills and knowledge required to effectively analyse the workplace in relation to environmentally sustainable work practices, and to implement improvements and monitor their effectiveness.

This unit of competency applies to those who have responsibility for a specific area of work or who lead a work group or team. It addresses the knowledge, processes and techniques necessary to implement and monitor environmentally sustainable work practices, including the development of processes and tools.

It includes identifying areas for improvement, developing plans to make improvements, and implementing and monitoring improvements in environmental performance.

This unit of competency applies to all sectors of the manufacturing industry and members of its value chain. It may also be applied to all sections of an organisation, including office and warehouse. This unit will need to be appropriately contextualised as it is applied across an organisation and across different industry sectors.

This unit of competency applies to an individual working alone or as part of a team/work group and working in liaison with other shift team members and the control room operator, as appropriate.

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

Pre-requisite Unit

Nil

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Competency Field

HSE

Unit Sector

Elements and Performance Criteria

Elements describe the essential outcomes		Performance criteria describe the performance needed to demonstrate achievement of the element	
1	**Investigate current practices in relation to resource usage**	1.1	Identify environmental regulations applying to the enterprise
		1.2	Assess procedures for assessing compliance with environmental regulations
		1.3	Collect information on environmental and resource efficiency systems and procedures and provide to the work group, as required
		1.4	Measure and record current resource usage by members of the work group
		1.5	Analyse and record current purchasing strategies
		1.6	Analyse current work processes to access information and data, and assist in identifying areas for improvement
2	**Set targets for improvements**	2.1	Seek input from stakeholders, key personnel and specialists
		2.2	Access external sources of information and data as required
		2.3	Evaluate alternative solutions to workplace environmental issues
		2.4	Set efficiency targets
3	**Implement performance**	3.1	Source and use techniques/tools to assist in achieving targets

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	improvement strategies	3.2	Apply continuous improvement strategies to own work area of responsibility, and communicate ideas and possible solutions to the work group and management
		3.3	Integrate environmental and resource efficiency improvement plans for own work group with other operational activities and implement them
		3.4	Seek suggestions and ideas about environmental and resource efficiency management from stakeholders and act upon them where appropriate
		3.5	Implement costing strategies to fully value environmental assets
4	**Monitor performance**	4.1	Document outcomes and communicate reports on targets to key personnel and stakeholders
		4.2	Evaluate strategies and environmental performance, including breaches or potential breaches of regulations and occurrences outside of standard procedure which may lead to lower environmental performance
		4.3	Set new targets and investigate and apply new tools and strategies
		4.4	Promote successful strategies and reward participants where possible

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

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

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Regulatory framework

The latest version of all legislation, regulations, industry codes of practice and Australian/international standards, or the version specified by the local regulatory authority, must be used, and include one or more of the following:

- legislative requirements, including work health and safety (WHS)
- industry codes of practice and guidelines
- environmental regulations and guidelines
- Australian and other standards
- licence and certification requirements
- *ISO 14001:2015 Environmental management systems*

Procedures

All operations must be performed in accordance with relevant procedures.

Procedures are written, verbal, visual, computer-based or in some other form, and include one or more of the following:

- work instructions
- standard operating procedures (SOPs)
- safe work method statements (SWMS)
- formulas/recipes
- batch sheets
- temporary instructions
- any similar instructions provided for the smooth running of the plant

Unit Mapping Information

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=d1287d36-dff4-4e9f-ad2c-9d6270054027

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Assessment Requirements for MSMENV472 Implement and monitor environmentally sustainable work practices

Modification History

Release 1. Supersedes and is equivalent to MSAENV472B Implement and monitor environmentally sustainable work practices

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy the requirements of the elements and performance criteria and must include the ability to:

- investigate/analyse resource usage
- evaluate improvement alternatives and set targets
- implement improvements within the limit of own authority
- monitor the performance of improvements.

Knowledge Evidence

Evidence must be provided that demonstrates knowledge of:

- relevant environmental and resource efficiency issues, specific to industry practices, including:
  - contribution to climate change and other macro threats that can arise from materials and work processes used
  - regulated environmental issues
  - issues relevant to licencing conditions
- best practice environmental approaches relevant to own area of responsibility
- methods for measuring and calculating resource usage.

Assessment Conditions

- The unit should be assessed holistically and the judgement of competence based on a holistic assessment of the evidence.
- The collection of performance evidence:
  - should occur over a range of situations
  - will typically include a supervisor/third-party report focusing on consistent performance and problem recognition and solving. A supervisor/third-party report must be prepared by someone who has a direct, relevant, current relationship with the person being assessed and who is in a position to form a judgement on workplace performance relevant to the unit of competency
  - will typically include the use of appropriate tools, equipment and documents

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    - may use industry-based simulation for all or part of the unit particularly where safety, lack of opportunity or significant cost is an issue.
- Assessment should occur in operational workplace situations. Where this is not possible, or where personal safety or environmental damage are limiting factors, assessment must occur in a sufficiently rigorous simulated environment reflecting realistic operational workplace conditions. This must cover all aspects of workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills.
- Assessment in a simulated environment should use evidence collected from one or more of:
    - walk-throughs
    - pilot plant operation
    - demonstration of skills
    - industry based case studies/scenarios
    - ‘what ifs’.
- Knowledge evidence may be collected concurrently with performance evidence (provided a record is kept) or through an independent process, such as workbooks, written assessments or interviews (provided a record is kept).
- Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.
- Conditions for assessment must include access to all tools, equipment, materials and documentation required, including relevant workplace procedures, product and manufacturing specifications associated with this unit.
- The regulatory framework will be reflected in workplace policies and procedures and is not required to be independently assessed.
- Foundation skills are integral to competent performance of the unit and should not be assessed separately.
- As a minimum, assessors must satisfy the Standards for Registered Training Organisations 2015 assessor requirements.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=d1287d36-dff4-4e9f-ad2c-9d6270054027

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MSS015002 Develop strategies for more sustainable use of resources

Modification History

Release 1. Supersedes and is equivalent to MSS015002A Develop strategies for more sustainable use of resources.

Application

This unit of competency covers identifying strategies for more sustainable uses of resources. The unit includes the identification of waste (muda) as part of a strategy for achieving better sustainability outcomes in a process as well as quantifying theoretical and actual resource (including energy) consumption.

This unit applies inside organisations and their value chains and specifically applies to the use of resources as part of an overall response to improving sustainability. 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 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. A manager or technical specialist who has a major responsibility for sustainability as part of a broader work role would typically undertake this, or sustainability may be their primary work responsibility.

For specific techniques covering the auditing of water, energy, emissions and transport, refer to relevant sustainability audit units.

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

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Pre-requisite Unit

Nil

Competency Field

Sustainable operations

Unit Sector

Not applicable

Elements and Performance Criteria

Elements describe the essential outcomes.		Performance criteria describe the performance needed to demonstrate achievement of the element.	
1	**Quantify 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 muda (waste)**	3.1	Short-list high emission process steps.
		3.2	Analyse process to identify emission steps or locations.
		3.3	Determine root cause of emission.
		3.4	Investigate methods for reducing emission.
		3.5	Develop strategies and recommendations for improvement.

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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.

Foundation Skills

This section describes those required skills (language, literacy and numeracy) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

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

Muda (waste) includes all of

- excess production and early production
- delays
- movement and transport
- poor process design
- inventory
- inefficient performance of a process
- making defective items
- activities which do not yield any benefit to the organisation or any benefit to the organisation’s customers.

Emissions include one or more of

- known or able to be physically measured emissions of gases, vapours, fumes, liquids or solids
- assumed emissions through material balancing
- assumed emissions through energy loss, including heat, friction and other energy conversion yield losses.

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Significant resources are deemed to be significant because they include one or more of	• high volume • high value • high environmental significance • important to the product or process • covered by legislation or regulation • important to the enterprise.

Unit Mapping Information

Release 1. Supersedes and is equivalent to MSS015002A Develop strategies for more sustainable use of resources.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998

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Assessment Requirements for MSS015002 Develop strategies for more sustainable use of resources

Modification History

Release 1. Supersedes and is equivalent to MSS015002A Develop strategies for more sustainable use of resources.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy the requirements of the elements and performance criteria and include the ability, for one or more value chain or process, to:

- quantify significant resource consumption and emission using materials balancing
- identify and consult with stakeholders
- develop strategies for reducing emissions
- prepare and present a resources use report.

Knowledge Evidence

- Must provide evidence that demonstrates sufficient knowledge to interact with relevant personnel and be able to identify strategies for more sustainable uses of resources including knowledge of:
- the concept of muda (waste) and muda categories
- muda reduction methods and strategies
- methods and uses of material balancing
- methods and uses of energy balancing
- methods of comparing theoretical with actual resource consumption
- methods for mapping processes and resources consumed
- methods of measuring actual resource usage
- AS/NZS ISO 14001 Environmental Management Standards (or its authorised replacement or other relevant standard).

Assessment Conditions

- The unit should be assessed holistically and the judgement of competence shall be based on a holistic assessment of the evidence.
- The collection of performance evidence is best done from a report and/or folio of evidence drawn from:
  - a single project which provides sufficient evidence of the requirements of all the elements and performance criteria
  - multiple smaller projects which together provide sufficient evidence of the requirements of all the elements and performance criteria.

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- A third party report, or similar, may be needed to testify to the work done by the individual, particularly when the project has been done as part of a project team.
- Assessment should use a real project where strategies for more sustainable uses of resources are identified for an operational workplace.
- Knowledge evidence may be collected concurrently with performance evidence or through an independent process such as workbooks, written assessments or interviews (provided a record is kept).
- Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.
- Conditions for assessment must include access to all tools, equipment, materials and documentation required including relevant workplace procedures, product and manufacturing specifications associated with this unit.
- Foundation skills are integral to competent performance of the unit and should not be assessed separately.
- Assessors must satisfy the assessor competency requirements that are in place at the time of the assessment as set by the VET regulator.
- The assessor must demonstrate both technical competency and currency.
- Technical competence can be demonstrated through:
  - relevant VET or other qualification/Statement of Attainment AND/OR
  - relevant workplace experience
- Currency can be demonstrated through:
  - performing the competency being assessed as part of current employment OR
  - having consulted with an organisation providing relevant environmental monitoring, management or technology services about performing the competency being assessed within the last twelve months.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998

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PSPETH001 Uphold the values and principles of public service

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPETHC301B Uphold the values and principles of public service. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to demonstrate ethical conduct required of those in public service. It includes applying ethical standards and dealing with ethical problems.

This unit applies to those working in public sector roles but may be applied to anyone working in a similar organisational context.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit will generally work independently and as part of a team. They would perform routine tasks in a range of familiar contexts.

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

Competency Field

Ethics

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Apply ethical standards	1.1 Review interpretation of ethical values and principles with senior staff to ensure accuracy. 1.2 Apply ethical standards when preparing verbal and written advice and reports. 1.3 Use public resources ethically, ensuring conflicts of interest are declared, addressed and documented. 1.4 Apply ethical standards in all relationships with the public, suppliers and business contacts.
2. Deal with ethical problems	2.1 Resolve ethical problems or refer as required. 2.2 Document all decision-making processes used and record outcomes. 2.3 Implement preventative strategies. 2.4 Report unethical conduct.

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance :

1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	4	5
Learning					Reading					Writing					Oral communication					Numeracy NA					

Performance variables:

1	2	**3**	4	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5
Support					Context					Text complexity					Task complexity				

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPETHC301B Uphold the values and principles of public service.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPETH001 Uphold the values and principles of public service

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. The candidate must demonstrate evidence of performance of the following on at least one occasion:

- applying objective and impartial evaluation of conflicting requirements
- 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

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- fundamental ethical principles, including at least one of:
  - justice
  - respect for persons
  - procedural fairness
  - confidentiality
  - responsible care
- values of public sector office
- natural justice/procedural fairness
- ethical decision making/problem solving models, organisational codes and procedures and how to access these
- procedures for declaring conflicts of interest
- protocols for reporting fraud, corruption and maladministration

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPETH002 Uphold and support the values and principles of public service

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPETHC401A Uphold and support the values and principles of public service. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to contribute to an ethical workplace and participate in ethical decision making.

This unit applies to those working in public sector roles but may be applied to anyone working in a similar organisational context.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would generally work independently and as part of a team, where they may have some supervisory responsibilities. They would perform complex tasks in a range of familiar contexts.

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

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Competency Field

Ethics

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Contribute to an ethical workplace	1.1 Access, interpret and apply information on ethical values. 1.2 Discuss and confirm application of ethical values and principle with senior management and colleagues to ensure common understanding and application. 1.3 Assist others to access and use public sector ethics legislation and guidelines to ensure compliance with requirements. 1.4 Explain the differences between ethics and personal beliefs to others to encourage understanding and compliance with the principles of procedural fairness. 1.5 Identify and discuss with work colleagues hypothetical work practices that would constitute unethical conduct including strategies to avoid or deal with them.
2. Participate in ethical decision-making	2.1 Identify real and potential ethical problems, and the decision-making processes used to resolve or refer them. 2.2 Monitor and access information to ensure currency in ethical knowledge. 2.3 Develop judgment through involvement in workplace discussions or ongoing professional development related to ethical standards and practices. 2.4 Support staff to contribute to ethical discussions and problem-solving. 2.5 Use processes for preventing and reporting unethical conduct and assist others in their application.

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

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ACSF levels indicative of performance :

1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	4	5
Learning					Reading					Writing					Oral communication					Numeracy NA					

Performance variables:

1	2	**3**	4	5	1	2	3	**4**	5	1	2	3	**4**	5	1	2	3	**4**	5
Support					Context					Text complexity					Task complexity				

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to PSPETHC401A Uphold and support the values and principles of public service.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPETH002 Uphold and support the values and principles of public service

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. The candidate must demonstrate evidence of performance of the following on at least one occasion:

- accessing legislation and codes of ethics electronically or in hard copy
- applying objective and impartial evaluation of ethical problems
- preparing written reports that contain information that is impartial, substantiated, accurate and complete
- adjusting communication methods to suit different audiences

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- the nature of public sector ethics and ethical values as opposed to personal beliefs/value systems
- fundamental ethical principles including at least one of:
  - natural justice
  - procedural fairness
  - respect for persons
  - responsible care
- equal employment opportunity, equity and diversity principles
- procedures and protocols for reporting unethical conduct

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPETH003 Promote the values and ethos of public service

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPETHC501B Promote the values and ethos of public service. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to promote ethical standards to assist staff in avoiding conflicts of interest and to model and foster integrity.

This unit applies to those working in public sector roles but may be applied to anyone working in a similar organisational context.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, as part of a team and with supervisory responsibilities. They would perform complex tasks in a range of familiar contexts.

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

Competency Field

Ethics

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Promote ethical standards	1.1 Discuss interpretation of ethical standards with senior staff to ensure common understanding of requirements. 1.2 Explain to others the ethical obligations of public service and the consequences of unethical conduct. 1.3 Assess conduct of self and others against ethics standards, legislation and guidelines, and provide feedback. 1.4 Use the resolution and/or referral of ethical problems identified in dealings with staff and public as learning opportunities.
2. Assist staff to avoid conflicts of interest	2.1 Explain conflict of interest requirements to staff using situations they are likely to experience. 2.2 Discuss with staff matters involving competing interests or conflicting views and resolve or refer as required.
3. Model and foster integrity or conduct	3.1 Give ethical, lawful and reasonable directions to staff, using personal work practices, to provide a consistent example of desired ethical conduct, and develop team values through collaboration and leadership. 3.2 Provide protection from reprisals for refusing others' directions to act unethically. 3.3 Model and explain to others the principles of procedural fairness. 3.4 Explain, promote and use decision making which upholds ethical standards. 3.5 Assess the risk of unethical conduct and recommend changes to policies or practices to improve outcomes. 3.6 Encourage the reporting of suspected unethical conduct.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit. ACSF mapping was not completed due to VET reform timelines, it has been noted for continuous improvement.

Unit Mapping Information

This unit supersedes and is equivalent to PSPETHC501B Promote the values and ethos of public service.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPETH003 Promote the values and ethos of public service

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying ethical decision making/problem solving
- using a variety of words and language structures to explain complex ideas to different audiences
- interpreting and explaining complex, formal documents and assisting others to apply them in the workplace
- using strategies to clarify understanding
- preparing written advice and reports requiring accuracy of expression
- accessing legislation and codes of ethics electronically or in hard copy
- assisting others to apply occupational health and safety and environmental procedures relating to ethical work practices

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- organisational code of ethics/conduct
- legislation related to privacy, freedom of information, human rights, whistleblower protection and procedural fairness
- procedures for declaring conflicts of interest
- procedures or protocols for reporting unethical conduct
- work health and safety procedures relating to ethical work practices

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN021 Contribute to conflict management

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV314A Contribute to conflict management. • Unit code updated • Content and formatting updated to comply with the new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to contribute to conflict management. It includes recognising the presence of conflict, dealing with emotions, overcoming barriers to communication, gathering facts, agreeing upon and implementing action.

This unit applies to those working in a role where they may be required to deal with conflict in the workplace.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would generally work independently, performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Recognise the presence of conflict	1.1 Recognise and acknowledge conflict situations and/or the potential for conflict. 1.2 Avoid conflict situations where possible, seek assistance when necessary. 1.3 Record actual and/or potential conflict.
2. Deal with emotions	2.1 Reflect on own behaviour and feelings about the situation. 2.2 Recognise and manage own emotions. 2.3 Acknowledge and deal with other parties' emotions in a manner that prevents escalation.
3. Overcome barriers to communication	3.1 Identify barriers to effective communication. 3.2 Use appropriate communication techniques to identify, clarify and confirm factors and issues relevant to the situation, seeking third party support if necessary. 3.3 Take into account social and cultural differences in communication style and approach.
4. Gather the facts	4.1 Encourage the other party to describe the facts as they see them. 4.2 Assess information from the other party, considering emotions or behaviour. 4.3 Share facts objectively from own point of view with the other party. 4.4 Gather and include additional information, to ensure all perspectives are considered.
5. Agree on and implement action	5.1 Determine strategies to resolve the problem in consultation with the other party. 5.2 Obtain approval where necessary on agreed strategies and implement. 5.3 Monitor progress to confirm the effectiveness of the agreed action, complete records and reports. 5.4 Refer, where agreement cannot be reached, on strategies for resolution.

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Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV314A Contribute to conflict management.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN021 Contribute to conflict management

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- using communication techniques with a diverse workforce and client base including assertiveness, listening, non-verbal communication, language style, problem solving
- dealing with difficult situations

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including WHS and environment, regulations, organisational policies, procedures and guidelines relating to managing conflict in the public sector
- 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
- concept of personal power vs. positional power

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN028 Provide a quotation

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV407B Provide a quotation. • Unit code updated • Content and formatting updated to comply with the new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to conduct a cost-benefit analysis and the preparation of written or oral quotations to provide goods or services to others. It includes clarifying requirements, establishing costs and availability of resources, preparing estimates, preparing and submitting quotations and taking follow up action.

This unit applies to those working in generalist or specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, performing complex tasks in a range of familiar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Clarify requirements	1.1 Confirm requirements with the funder and/or purchaser. 1.2 Conduct market research to confirm the viability of providing a quotation.
2. Establish costs and availability of resources	2.1 Obtain costs for labour, equipment or materials and include in the quotation in full. 2.2 Confirm availability of equipment, materials or personnel for the timeframe required. 2.3 Include infrastructure costs to the organisation of providing the goods or services. 2.4 Include cost or benefit from any asset disposal at the conclusion of the contract.
3. Prepare estimate	3.1 Prepare estimate to take account of all requirements and allow for contingencies. 3.2 Structure estimate to provide for cost recovery or to return a profit. 3.3 Estimate costs to enable provision of goods or services to the standards required by the client. 3.4 Check estimate for accuracy.
4. Prepare and submit quotation	4.1 Include required details to meet client requirements. 4.2 Submit quotation within required timeframe.
5. Take follow up action	5.1 Negotiate changes and variations to the quotation to meet the needs of the client and the organisation. 5.2 Evaluate proposal, outcome and preparation process based on feedback from a range of stakeholders and use results to improve subsequent quotations.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV407B Provide a quotation.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN028 Provide a quotation

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- using numeracy for selecting and applying mathematical concepts, estimating, checking reasonableness of results
- using mathematical language to communicate mathematical information
- managing financial and other resources
- using literacy for oral clarification of issues and negotiating variations and changes with clients
- using required language and style for written quotations
- using technical and other vocabulary
- applying research and analysis methods
- using problem solving including conceptual/reasoning skills
- networking with clients, suppliers and stakeholders

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including WHS and environment, guidelines, policies and practices relating to providing quotations for services
- organisational tendering guidelines, policies and practices
- financial accountability requirements
- legal requirements of selling government services
- implications of contracting agreements where government is the provider

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- whole-of-life considerations
- disposals considerations including legal aspects of disposals
- approval processes
- tendering management processes

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN039 Develop internal and external networks

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV418A Develop internal and external networks. • Unit code updated • Content and formatting updated to comply with the new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to develop and maintain effective workplace relationships and networks. It includes establishing and maintaining working relationships, and representing and promoting the organisation.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently performing complex tasks in a range of familiar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Build and maintain networks	1.1 Identify networking opportunities and pursue to maximise a range of personal industry contacts. 1.2 Communicate information regarding new network opportunities to inform colleagues and managers of the potential benefits to the organisation of involvement. 1.3 Assess the level of usefulness of existing networks against current involvement, and make adjustments to improve or downgrade relationships. 1.4 Maintain participation in professional networks and associations to obtain and maintain personal knowledge and skills.
2. Establish and maintain working relationships	2.1 Use networking strategies to establish and maintain working relationships that promote benefits consistent with organisational objectives. 2.2 Gain and maintain trust and confidence of key stakeholders through high standards of ethical practice. 2.3 Use negotiation and collaborative problem solving to achieve positive outcomes when difficult situations arise. 2.4 Establish and maintain formal and informal communication channels to exchange information and ideas. 2.5 Incorporate networking into professional and organisational planning regimes to maximise its usefulness to the organisation.
3. Represent and promote the organisation	3.1 Represent and promote the organisation’s interests and requirements using a range of strategies tailored to diverse participants in the networks. 3.2 Provide information on organisational issues, policies and practices authorised for public presentation orally and in writing in accordance with network requirements. 3.3 Seek feedback from stakeholders to identify and develop ways to improve promotional activities within available resources.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV418A Develop internal and external networks.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN039 Develop internal and external networks

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- demonstrating leadership to gain the trust and confidence of clients and colleagues
- using communication strategies, including giving and receiving feedback, reporting, maintaining effective relationships, and managing conflict
- using problem solving and negotiation to manage contingencies and achieve mutually acceptable outcomes
- reading and understanding a variety of texts
- preparing general information and papers according to target audiences
- proofreading and editing to ensure clarity of meaning and conformity to organisational requirements, checking for accuracy and consistency of information

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including WHS and environment, regulations, policies, procedures and guidelines relating to the public sector environment
- organisational policies, plans and procedures
- principles and operations of networks
- principles of effective communication in relation to listening, questioning and non-verbal communication
- techniques for building relationships of trust including those with people from different cultures

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- techniques for facilitating mutually acceptable outcomes
- methods and techniques to prepare and present information to promote the organisation
- related organisations, agencies and networks

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN043 Apply government processes

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV422A Apply government processes. • Unit code updated • Content and formatting updated to comply with the new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to apply government processes. It includes applying information relating to the machinery of government and knowledge of organisations protocols and functions.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Apply information relating to the machinery of Government	1.1 Identify, access and apply up-to-date information relating to machinery of Government relevant to work responsibilities. 1.2 Identify ambiguity in the structure and function of the organisation or work area as a result of past, present or future changes and seek and implement advice on required work priorities and outcomes for the transition period. 1.3 Manage role ambiguity as a result of past, present or future changes.
2. Apply knowledge of organisational functions	2.1 Access and apply up-to-date information relating to the structure and functions of the organisation. 2.2 Identify appropriate persons to ensure correct levels of authority are utilised to deal with responsibilities within the organisation. 2.3 Identify areas of work where delegations apply and confirm delegation levels within the organisation. 2.4 Obtain approvals in the workplace in accordance with organisational delegations.
3. Apply knowledge of protocols	3.1 Identify, access and apply up-to-date information relating to government protocols. 3.2 Observe protocols in dealings with other organisations and with persons from within and outside the organisation. 3.3 Adhere to written protocols, formats and standards in writing government documents.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV422A Apply government processes.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN043 Apply government processes

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- locating and accessing information
- acquiring, retaining and recalling information
- applying information and protocols
- discarding redundant information
- dealing with ambiguity and machinery of Government changes
- communicating with a diverse workforce

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Westminster System
- separation of powers
- systems of government
- Parliamentary structures (bicameral/unicameral)
- role and function of Parliament
- role and structures of Parliamentary committees
- application of statutory requirements imposed by central agencies, including Treasury, Premiers, Prime Minister and Cabinet
- Parliamentary procedures impacting on the organisation (including petitions, Ministerial statements, Question Time, Questions without Notice, Questions on Notice)

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- Parliamentary process and how it affects operational objectives and timeframes
- Cabinet processes
- Bill to Act process
- Machinery of Government and administrative arrangements
- range and type of legislation relating to the public sector including occupational health and safety
- public sector code/s of ethics, code/s of conduct and statements of values

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN049 Undertake negotiations

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV507A Undertake negotiations. • Unit code updated • Content and formatting updated to comply with the new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to undertake negotiations. It includes planning and finalising negotiation outcomes.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Plan for negotiation	1.1 Clarify the purpose of the negotiation and the issue/s under consideration with affected personnel and through analysis of all related information. 1.2 Identify primary needs and desired outcomes of all parties. 1.3 Determine the organisation's position in consultation with senior personnel, and devise a negotiation approach based on an analysis of the strengths and weaknesses of the position. 1.4 Collect, analyse and organise information relating to the negotiation, including any precedents. 1.5 Agree upon timeframe and logistics, develop a negotiation plan and communicate to other staff, if any, involved in the negotiation team.
2. Conduct negotiation	2.1 Agree upon the issue/s under consideration and the negotiation process to be used with all parties and document. 2.2 Use negotiation techniques to persuade the other party of the strength of the argument in favour of the organisation's position. 2.3 Modify the negotiation plan if necessary to respond to contingencies. 2.4 Select and use techniques for dealing with conflict or deadlocks in accordance with the negotiation plan and the progress of the negotiation. 2.5 Discuss options for resolving the issue and determine the acceptability of these to the parties.
3. Finalise negotiation outcomes	3.1 Reach an agreed conclusion, document and obtain sign-off by the parties. 3.2 Report negotiation outcomes and debrief stakeholders if required. 3.3 Determine any further action required as a result of agreement and action. 3.4 Review the negotiation process and outcomes, and document lessons learnt for future use.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV507A Undertake negotiations.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN049 Undertake negotiations

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying legislation, regulations and policies relating to negotiating in the public sector
- communicating with diverse stakeholders including the other party, team members and senior management
- communicating by listening, questioning, establishing rapport and responding
- applying decision making and problem-solving
- adjusting quickly to new information or unexpected questions and attitudes

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- legislation, regulations, policies, procedures and guidelines relating to negotiations in the public sector
- sources of organisational information
- delegations and lines of authority
- decision making
- negotiation techniques
- conflict resolution
- recordkeeping requirements for negotiations

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPGEN067 Establish and maintain strategic networks

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPGOV602B Establish and maintain strategic networks. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to establish, expand and use strategic networks. It includes identifying features of required strategic networks, identifying or establishing network links with key stakeholders and building strategic relationships.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

General

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Identify features of required strategic networks	1.1 Identify the strategic value and likely outcomes of participating in networks at an individual and organisational level. 1.2 Research and assess the benefits of existing networks. 1.3 Identify key stakeholders and their needs, expectations and roles.
2. Identify or establish network links with key stakeholders	2.1 Identify existing network links between key stakeholders, and identify and initiate strategies to maintain or expand them. 2.2 Establish and use new network links between self and key internal and external stakeholders. 2.3 Develop and maintain strong working relationships among network members.
3. Build strategic relationships	3.1 Establish effective communication channels to exchange strategic information for the mutual benefit of network members. 3.2 Interact and consult with key stakeholders to anticipate developments that may impact on the organisation and require a strategic approach to dealing with them. 3.3 Identify and address misunderstandings and conflict situations. 3.4 Seek and act upon opportunities to improve communication processes and achieve mutually beneficial outcomes.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV602B Establish and maintain strategic networks.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPGEN067 Establish and maintain strategic networks

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence requirements to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying legislation, regulations and policies relating to public sector environment
- using communication methods with diverse strategic networks including consultation, liaison, negotiation, building influence and reputation, transparency
- using formal and informal industry communication channels
- resolving conflict in a strategic networking context

Knowledge Evidence

Evidence requirements to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including WHS and environment, 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

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

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Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPLEG001 Comply with legislation in the public sector

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPLEGN301B Comply with legislation in the public sector. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to identify and comply with legislative requirements and report non-compliance.

This unit applies to those working in generalist or specialist work activities where it is essential to identify, understand and comply with the legislative environment within which they work.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work under supervision while performing routine tasks in range of familiar contexts.

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

Competency Field

Legislation and compliance

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Identify legislative requirements	1.1 Access legislation and guidelines relating to the workplace. 1.2 Identify key requirements of relevant legislation and confirm with senior staff. 1.3 Confirm understanding of requirements of legislation and ensure consistency of interpretation and application. 1.4 Clarify the way various pieces of legislation are integrated to provide a legislative framework. 1.5 Seek advice when conflicting legislative directives are found.
2. Comply with legislative requirements	2.1 Carry out work practices. 2.2 Review own conduct and use feedback from others to confirm continuing compliance.
3. Report incidents of non-compliance	3.1 Raise possible breaches of legislation with an authorised person or body. 3.2 Identify and address inadequacies in workplace procedures that contribute to non-compliance.

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance :

1	2	**3**	4	5	1	2	3	**4**	5	1	2	**3**	4	5	1	2	**3**	4	5	1	2	3	4	5
Learning					Reading					Writing					Oral communication					Numeracy NA					

Performance variables

1	**2**	3	4	5	1	2	**3**	4	5	1	2	**3**	4	5	1	2	**3**	4	5
Support					Context					Text complexity					Task complexity				

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Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to PSPLEGN301B Comply with legislation in the public sector.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPLEG001 Comply with legislation in the public sector

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. The candidate must demonstrate evidence of performance of the following on at least one occasion.

- undertaking research, evaluation and self-assessment
- reading complex and formal documents to identify inappropriate conduct
- communicating with others involving exchanges of complex oral and written information
- using technology to access legislative requirements

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- full range of legislation relating to the public sector, including WHS, and the key requirements of each
- public sector ethics and codes of conduct
- principles of equal employment opportunity, equity and diversity
- organisational processes for responding to legislative issues

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

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Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPMGT006 Develop a business case

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPMNGT607B Develop a business case. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to perform market analysis, development and cost options, and justify for a recommended business solution.

This unit applies to those developing appropriate and cost-effective business solutions.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks in a range of familiar contexts.

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

Competency Field

Management

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Research a business case	1.1 Identify and confirm business problem. 1.2 Analyse key stakeholder requirements to clarify objectives. 1.3 Consider a range of factors to identify opportunities and constraints. 1.4 Conduct market analysis.
2. Examine business solutions	2.1 Analyse and document business and technical impacts and risks. 2.2 Analyse community, environmental and human resource impacts. 2.3 Canvas for alternative solutions and their financial implications and discuss with senior management and business case originator.
3. Construct a business case	3.1 Develop options and determine and document impacts, risks, costs and stakeholders. 3.2 Make and justify recommendations.
4. Finalise a business case	4.1 Present business case and explain recommendations. 4.2 Obtain approvals and management endorsement.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPMNGT607B Develop a business case.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPMGT006 Develop a business case

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- managing resources
- using language and style suited to written submissions
- explaining complex ideas to different audiences
- interpreting and explaining complex, formal documents
- preparing written advice and reports requiring reasoning and precision of expression
- engaging in discussion using exchange of complex oral information

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- government and organisational goals, policies and practices
- legal requirements related to the business activity
- financial and accounting issues relating to developing a business case
- whole-of-life considerations
- approval processes
- aspects of trade practices law, commercial law and law of contract relating to the development of business cases
- jurisdictional legislation that applies to business case development, including work health and safety and environmental requirements

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPMGT012 Facilitate knowledge management

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPMNGT614A Facilitate knowledge management. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to manage knowledge and information in the business unit to improve productivity and organisational efficiency, promote innovation and meet business unit goals. It includes establishing the organisational context for knowledge management, developing capability, facilitating knowledge management, and integrating aspects of knowledge management with records management.

This unit applies to those working to facilitate knowledge management within their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks in a range of familiar contexts.

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

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Competency Field

Management

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Establish the organisational context for knowledge management	1.1 Identify the organisation's history, culture, functions, strategic direction, performance and knowledge resources. 1.2 Identify organisational strategies and goals that may be assisted by the development of organisational capability in knowledge management. 1.3 Assess the current knowledge management position of the organisation and determine the strengths and weaknesses of its knowledge resources and activities. 1.4 Undertake consultation with stakeholders to raise and awareness of knowledge management and to establish goals for the business unit and/or the organisation. 1.5 Identify and explore the cultural aspects of knowledge and knowledge management in the context of the organisational environment.
2. Develop capability in knowledge management	2.1 Identify and promote the benefits of knowledge management. 2.2 Develop and align knowledge management initiatives with the overall organisational strategy. 2.3 Develop initiatives to build long-term capability in knowledge management and a culture of sharing knowledge and to create new knowledge in the organisation. 2.4 Build management and stakeholder support throughout knowledge management initiatives to ensure immediate successes are transformed into ongoing benefits.
3. Facilitate knowledge management	3.1 Facilitate methods for creating, discovering and acquiring knowledge in the business unit. 3.2 Promote methods and systems for capturing and storing knowledge. 3.3 Promote methods and systems for presenting, distributing and sharing knowledge. 3.4 Facilitate activities for revising and disposing of knowledge.
4. Integrate aspects of	4.1 Integrate processes for the management of explicit knowledge with the organisation's information management systems.

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knowledge management with information management	4.2 Record and store explicit knowledge. 4.3 Facilitate structuring, maintaining and linking of explicit knowledge to related organisational information. 4.4 Manage knowledge and information to improve their integration and use to meet business unit goals.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPMNGT614A Facilitate knowledge management.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPMGT012 Facilitate knowledge management

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying legislation, regulations and policies relating to knowledge management and information management
- showing leadership and taking risks in the context of knowledge management
- facilitating groups and learning
- communicating with a diverse range of stakeholders to build knowledge management capacity

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including work health and safety and environment, regulations, policies, procedures and guidelines relating to knowledge management and information management, including privacy, freedom of information
- principles of knowledge management
- Australian Standard for Knowledge management
- tools and techniques related to introduction of knowledge management initiatives
- intersection of knowledge management with other disciplines, including organisational learning, information management/technology, human resources management, communications
- cultural aspects of knowledge and knowledge management

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

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PSPPCM006 Select providers and develop contracts

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC413A Select providers and develop contracts. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to select preferred providers as a result of a formal request for offer process. It includes evaluating offers, obtaining approvals, developing and formalising contractual arrangements, and debriefing the market and other stakeholders.

This unit applies to those working as public sector staff required to select providers.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work under supervision, while performing complex tasks in familiar context.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Select preferred providers	1.1 Form and coordinate evaluation panel. 1.2 Evaluate offers according to evaluation plan and organisational probity requirements which relate to managing conflicts of interest and adherence to public sector standards. 1.3 Obtain specialist expertise where necessary to assist with evaluation of offers. 1.4 Undertake clarification and negotiation of matters contained in offers with bidders. 1.5 Select preferred providers and develop, justify and document recommendations for allocation of business against selection criteria. 1.6 Obtain approvals for the recommended offers. 1.7 Notify successful providers.
2. Develop and formalise contractual arrangements	2.1 Obtain approvals to enter negotiations and negotiate final wording of contract. 2.2 Obtain approvals to enter into contracts and ensure contracts are signed by all parties before contracted work commences. 2.3 Structure contracts to capture and address identified risks, protect both parties, provide the basis for due performance, and outline expected standards of behaviour. 2.4 Ensure contracts are valid and legally binding to the parties.
3. Debrief market and other stakeholders	3.1 Provide advice on the contractual arrangements to internal stakeholders. 3.2 Inform unsuccessful bidders and provide constructive feedback on their proposals. 3.3 Make details of successful providers public.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC413A Select providers and develop contracts.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM006 Select providers and develop contracts

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- networking within probity boundaries with diverse stakeholders and contractors
- applying probity requirements in evaluating offers, formalising contracts and debriefing stakeholders
- planning and organising skills to analyse and compare written information to ensure key elements from the specification and the procurement plan are captured in the written contract
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to award of contracts, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to receipt and selection of offers

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- aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts
- equal employment opportunity

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM007 Manage contracts

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC414A Manage contracts. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to manage contracts. It includes undertaking preparations, establishing and maintaining contract management arrangements, monitoring and maintaining contract performance, and completing and reviewing contracts.

This unit applies to those working as public sector employees with responsibilities relating to contract management.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously with management responsibilities while performing complex tasks in familiar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Prepare to manage a contract	1.1 Confirm and clarify contract requirements, approvals and funding arrangements and identify obligations and limits of authority. 1.2 Clarify and assist with contract administration issues by contacting specialists and stakeholders and confirm operational elements of the contract. 1.3 Identify and clarify key contract clauses. 1.4 Identify and confirm process, timings, and key performance indicators with stakeholders. 1.5 Develop or review the risk management plan. 1.6 Develop or obtain contract management strategy and enter key details from the contract. 1.7 Form contract management team and allocate roles and responsibilities.
2. Implement a contract management strategy	2.1 Confirm and implement start-up or transition arrangements. 2.2 Establish information and contractor and stakeholder communication strategies. 2.3 Monitor and update risk management plan. 2.4 Manage relationship with contractors and stakeholders. 2.5 Obtain specialist expertise as necessary for progress meetings and for advice on or resolution of contract issues. 2.6 Maintain contract information and documentation.
3. Monitor and maintain performance of a contract	3.1 Ensure obligations to contractor and stakeholders are met. 3.2 Use monitoring and control measures and performance indicators to manage performance of contract and ensure that all obligations under the agreement are being met. 3.3 Manage contract variations. 3.4 Investigate and resolve or refer disputes and complaints. 3.5 Manage negotiation of contract issues. 3.6 Maintain communication with all stakeholders on the performance of the contract.
4. Complete and review contract	4.1 Confirm client satisfaction with contract deliverables. 4.2 Finalise, amend, cancel or terminate contracts. 4.3 Manage close-out, and renewal of contract or transition to a new contract. 4.4 Review contract management, contractor performance, user

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	satisfaction and audit results. 4.5 Document and explain variances to measures or outcomes that are not met in full. 4.6 Report on contractor performance and review contract management practice and make recommendations for improvement.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC414A Manage contracts.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM007 Manage contracts

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- networking, within probity boundaries, with diverse stakeholders and contractors
- interpreting complex documents, including contracts, legislation and guidelines
- applying simple supply chain and supplier issues management techniques

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- contract performance management
- privacy and confidentiality issues
- probity principles and issues
- financial and accounting issues relevant to the contract

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

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Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM008 Manage contract performance

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC503B Manage contract performance. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to implement strategies that ensure effective contract performance. It includes managing the business relationship, performance of the contract, and contract issues; and implementing a communication strategy.

This unit applies to those working in roles involved in procurement contract maintenance.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Manage the business relationship	1.1 Manage probity. 1.2 Meet obligations to the contractor. 1.3 Record consideration of conflicts of interest and their resolution. 1.4 Manage business relationship with contractor in the public interest through formal and informal mechanisms.
2. Manage performance of the contract	2.1 Implement start-up or transition arrangements. 2.2 Monitor and update contract management plan for effectiveness regularly. 2.3 Monitor performance of contract against key performance indicators and track milestones to ensure obligations under the agreement are being met. 2.4 Manage e-procurement, financial and other resources. 2.5 Identify and manage emerging and potential risks.
3. Manage contract issues	3.1 Manage contract variations. 3.2 Identify early signs of under-performance, and take action to improve performance. 3.3 Investigate and resolve or refer disputes and complaints. 3.4 Conduct negotiation of contract issues. 3.5 Address and resolve or refer conflict. 3.6 Deal with non-compliance with codes of conduct, codes of practice and standards of behaviour.
4. Implement communication and information strategy	4.1 Maintain communication on the performance of the contract with all stakeholders. 4.2 Carry out management reporting. 4.3 Maintain contract information for organisational purposes.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC503B Manage contract performance.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM008 Manage contract performance

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking with contractors and stakeholders
- reading and applying complex documents, including contracts, legislation and guidelines
- writing management reports and keeping records of meetings, liaison, notes and follow-up actions
- building effective working relationships with contractors and stakeholders
- modelling effective team management approaches
- referring issues to the correct person
- resolving disputes, conflict and complaints
- making judgements about when to refer disputes, conflict and complaints to others
- applying understanding of supplier issues/supply chain management in the context of contract management
- managing contract documentation
- planning and organising contract meetings, reports and reviews
- maintaining currency of best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- use electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

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- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- contract management for diverse contractual situations
- privacy and confidentiality issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- financial and accounting issues relevant to the contract
- legal aspects of negotiation
- aspects of law of contracts, trade practices law and commercial law relevant to the management of contracts relating to complex procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM009 Finalise contracts

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC504B Finalise contracts. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to finalise processes for contracts. It includes completing contracts and implementing a contract review strategy.

This unit applies to those working as public sector staff with responsibility for finalising contracts.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Complete contracts	1.1 Review contracts due to expire to determine future requirements, and canvass options meeting requirements. 1.2 Implement strategies to manage closure, renewal of contracts, or transition to a new contract. 1.3 Finalise, amend, cancel or terminate contracts according to arrangements. 1.4 Consult with contractor, and report completion, addressing contractor and contract manager performance.
2. Implement contract review strategy	2.1 Determine timing of contract review to ensure a smooth transition to post contract arrangements. 2.2 Review and monitor contract including contract management, contractor performance, user satisfaction and audit results. 2.3 Document variances where measures or outcomes are not met in full. 2.4 Prepare review report documenting outcomes against plans, final costs, user satisfaction, lessons learnt and any shortcomings in contract planning, management policies and procedures. 2.5 Suggest recommendations for improvement and support them with evidence.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC504B Finalise contracts.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM009 Finalise contracts

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- writing closure reports
- finalising outstanding issues so the contract can be closed
- identifying improvements to the contract management process
- managing contract closure documentation
- planning and organising contract closure meetings, reports and reviews

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract finalisation and review, including environmental purchasing and corporate social responsibility guidance
- privacy and confidentiality issues, including the requirement to appropriately classify information to ensure transparency as well as to treat bids as commercial-in-confidence
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to finalising contracts
- record keeping for official or historical records
- financial and accounting issues relevant to the contract

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- aspects of contract law, trade practices law and commercial law relevant to the finalisation of contracts relating to complex procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM010 Manage procurement risk

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC505A Manage procurement risk. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to manage risks associated with all stages of procurement. It includes assessing risk, and preparing, implementing and reviewing a risk management plan.

This unit applies to those working as public sector staff in roles that involve managing procurement risks.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

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

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Competency Field

Procurement

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Assess risk	1.1 Identify legislation, policies, business processes and resources impacting the contract. 1.2 Identify procurement outcomes and internal inputs required. 1.3 Identify and confirm critical success factors required. 1.4 Identify non trivial procurement risks. 1.5 Identify potential probity risks. 1.6 Analyse causes of risk and their potential impact. 1.7 Determine likelihood and consequences of risks and develop risk assessments.
2. Prepare risk management plan	2.1 Develop preliminary risk management plan to address risks identified in planning phase. 2.2 Identify acceptable risks and those requiring treatment. 2.3 Design treatments to reduce risks to an acceptable level. 2.4 Develop plans for implementing new treatments, additional risk controls or modifications to existing controls. 2.5 Monitor risk level at key points during procurement process and, review and adjust risk management plan to cover procurement activity risks not already identified.
3. Implement and review risk management plan	3.1 Implement risk controls and treatments according to the treatment plan. 3.2 Implement risk management plan, monitor and revise to include potential or emerging risks during the life of the procurement activity. 3.3 Improve risk treatments and controls using review results.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM010 Manage procurement risk

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- writing risk management plans using templates or a recognised risk management methodology
- interpreting complex, formal documents
- making verbal and written recommendations about the management of procurement and contracting risks
- analysing risks associated with procurement and contract
- managing and updating the risk management plan
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract risk management
- organisational procurement policies, practices and approval processes
- risk management procedures
- probity principles and issues, particularly as they relate to probity risks
- codes of conduct, codes of practice and standards of individual behaviour relating to the procurement process

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- risks associated with financial and accounting issues relevant to procurement and contract management
- supplier issues and supply chain management in the context of procurement risk management
- aspects of law of contracts, trade practices law and commercial law relevant to risk management relating to complex procurement
- equal employment opportunity relevant to procurement and contract management
- environmental, sustainability and corporate social responsibility principles relevant to procurement and contract management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM011 Plan to manage a contract

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC506A Plan to manage a contract. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to establish arrangements for contract management. It includes confirming contract requirements, preparing a contract management plan, developing stakeholder relationships and implementing contract strategies and contractual arrangements.

This unit applies to those working in roles involving procurement contract management.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Confirm contract requirements	1.1 Identify legislation, public sector standards and organisational requirements relating to probity, financial management, approvals and other considerations for inclusion in the contract management plan. 1.2 Re-confirm contract requirements with all parties. 1.3 Determine obligations to the contractor, limits of authority and delegations according to contractual arrangements. 1.4 Confirm start-up or transition arrangements.
2. Prepare contract management plan	2.1 Identify contract risks and develop a risk management plan. 2.2 Determine procedures to identify, receive and address contract variations. 2.3 Determine procedures to investigate, resolve or refer disputes or complaints. 2.4 Develop and negotiate key performance indicators and identify and approve administrative processes for the life of the contract. 2.5 Document, obtain approval on and maintain a contract management plan that addresses key elements. 2.6 Apply expected standards of behaviour, probity and privacy principles to all elements of contract management plan. 2.7 Apply environmental, sustainability and corporate social responsibility principles to all elements of contract management plan.
3. Develop stakeholder relationships	3.1 Identify stakeholder networks and relationships. 3.2 Use networking strategies to establish, develop and maintain working relationships to promote benefits to the contract requirements. 3.3 Develop and maintain confidence of stakeholders through high standards of behaviour and ethical conduct. 3.4 Use negotiation strategies to achieve positive outcomes when difficult situations arise. 3.5 Identify and confirm communication requirements in line with contractual obligations and stakeholder needs.
4. Implement contract strategies	4.1 Identify requirements of confidentiality and freedom of information for the contract. 4.2 Develop communication and/or information strategy that matches needs of the organisation, the contract and the contractor's

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	business environment. 4.3 Establish contract review requirements with stakeholders. 4.4 Develop contract review strategy to review management of the contract, contractor performance and user satisfaction.
5. Implement contractual arrangements	5.1 Establish and manage business relationship with contractor. 5.2 Implement start-up or transition arrangements. 5.3 Establish financial, administrative and information management processes. 5.4 Implement contractual arrangements according to contract management plan. 5.5 Maintain appropriate records for the life of the contract.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC506A Plan to manage a contract.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM011 Plan to manage a contract

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- developing a written contract management plan and sub-plans
- reading and applying complex documents, including contracts, legislation and guidelines
- provide feedback
- modelling effective team management approaches
- referring issues to the correct person
- applying understanding of supplier issues and supply chain management in the context of procurement risk management
- planning and organising skills to manage and update the contract management plan and sub-plans
- maintaining currency of best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- use electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing, sustainability and corporate social responsibility guidance relevant to the contract
- organisational procurement policies, practices and approval processes

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- contract management planning for diverse contractual situations
- privacy and confidentiality issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- financial and accounting issues relevant to the contract

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM012 Plan for procurement outcomes

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC507A Plan for procurement outcomes. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to apply advanced planning to complex procurement within established guidelines, policies and procedures.

This unit applies to those working in roles involving procurement planning.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work would work autonomously while performing complex tasks, in familiar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Establish, apply and manage procurement governance arrangements	1.1 Make contributions to forward procurement planning. 1.2 Apply organisational, financial and budgetary framework effectively to procurement. 1.3 Research and apply organisational objectives, policies and goals. 1.4 Identify and apply relevant interacting legislative, policy and probity requirements to the proposed procurement activity. 1.5 Develop and/or assess procurement needs, aligned to organisational objectives, business plan and appropriate justification of estimated procurement expenditure. 1.6 Propose alternatives to procurement action where appropriate. 1.7 Apply and manage probity principles when planning procurement activities.
2. Identify, consult with and manage procurement stakeholders	2.1 Identify internal and external stakeholders for procurement activities. 2.2 Develop strategies to effectively gather information from and distribute information to procurement stakeholders throughout the procurement process. 2.3 Inform and educate stakeholders on the concept of value for money. 2.4 Develop strategies for the ongoing consideration and management of key stakeholders.
3. Conduct market research and develop appropriate strategies to approach the market	3.1 Conduct market research and analysis. 3.2 Identify strengths and weaknesses of the market. 3.3 Determine appropriate procurement options and procurement methods for approaching the market, taking into account relevant jurisdictional and organisational policy requirements.
4. Identify, source and manage resources to conduct procurement processes	4.1 Identify, seek and manage financial and budgetary resources required to effectively conduct procurement processes. 4.2 Identify, seek and manage technical and procurement expertise required to effectively conduct procurement processes, including the establishment of tender evaluation panel or working group. 4.3 Determine and apply appropriate structures and processes to the conduct of the procurement, including operation of the tender evaluation panel or working group.

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	4.4 Plan and communicate appropriate lead times for conducting procurement processes to stakeholders.
5. Define procurement specifications and requirements	5.1 Align procurement requirements with organisational objectives and business plans that are realistic in terms of the capacity of the market to supply. 5.2 Develop and/or critically assess statements of requirements and specifications that meet business needs of the organisation. 5.3 Review previous procurements and consult stakeholders to inform and define the specifications. 5.4 Explore the viability of specifications to ensure risks and whole-of-life costs and benefits are identified and to support value for money.
6. Undertake detailed procurement planning	6.1 Assist stakeholders to make meaningful contributions to procurement plans. 6.2 Conduct procurement risk assessments and determine appropriate risk management strategies. 6.3 Address jurisdictional, organisational, legislative, policy and probity requirements. 6.4 Design a procurement process that achieves a value for money outcome, including consideration of whole-of-life costs and benefits. 6.5 Document detailed procurement plans and sub-plans for the various activities that will be conducted throughout the procurement process, including evaluation and reporting requirements. 6.6 Plan prompt execution of financial delegations and other approvals. 6.7 Undertake procurement activity in line with jurisdictional, organisational and best practice requirements for accountability and transparency, including record keeping and reporting regimes.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC507A Plan for procurement outcomes.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM012 Plan for procurement outcomes

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- writing a business case
- reading and applying complex documents, including contracts, legislation and guidelines
- providing feedback
- modelling effective team management approaches
- referring issues to the correct person
- resolving complicated procurement issues
- developing options for inclusion in a business case
- undertaking research and business analysis
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating the procurement plan and sub-plans
- maintaining currency in best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- using electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

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- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- procurement planning for complex procurement requirements and associated outcomes in alignment with business and organisational goals
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to the procurement process
- government procurement environment
- legal requirements of government procurement
- implications of particular procurement arrangements
- whole-of-life considerations
- financial and accounting issues relevant to the procurement
- cultural issues relating to complex procurement and industry development in certain industry sectors
- relationship management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM013 Make procurement decisions

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC508A Make procurement decisions. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to perform advanced decision making for complex procurement within established guidelines, policies and procedures.

This unit applies to those working roles involved in making procurement decisions.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks, in a range of familiar and unfamiliar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Comply with legal and policy obligations implicit in making procurement decisions	1.1 Identify and apply legislative and policy requirements and organisational objectives and goals to inform procurement decisions. 1.2 Apply and manage probity principles of fairness and impartiality when making procurement decisions at all stages of the process.
2. Establish context for the procurement activity	2.1 Identify and consider factors that may influence procurement decisions in the context of legislation, policy and organisational/business requirements to support effective decision making. 2.2 Consult with stakeholders to determine likely impact of key factors at all stages of procurement process. 2.3 Reflect determined key factors in procurement decisions affecting the procurement. 2.4 Document factors affecting procurement decisions.
3. Select and approve procurement methods	3.1 Select procurement methods based on jurisdictional, legislative and policy requirements and suitability for the procurement requirements. 3.2 Consider factors and risks in selecting procurement method. 3.3 Record justification for selected procurement method. 3.4 Exercise approvals for the selection of procurement methods and record.
4. Select and approve contractual arrangements	4.1 Select contractual arrangements, based on jurisdictional and policy requirements and suitability for the procurement requirements. 4.2 Consider factors and risks in selecting contractual arrangements. 4.3 Record justification for selected contractual arrangements. 4.4 Exercise approvals for the selection of contractual arrangements and record.
5. Identify and consider factors affecting supplier choice	5.1 Research and assess supplier capability as part of offer evaluation. 5.2 Research and apply supplier supply chain management considerations in the context of policy requirements when making procurement decisions. 5.3 Apply broader value for money considerations to support and

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	inform decisions.
6. Conduct tender evaluation	6.1 Form a tender evaluation panel or similar when required by policy or to meet probity requirements. 6.2 Provide advice, support and guidance on procurement processes and probity requirements to members of the tender evaluation panel. 6.3 Resolve any issues that arise during tender evaluation using negotiation and communication skills and procurement knowledge. 6.4 Document tender decision-making processes and decisions reached in a format suited to the procurement being undertaken. 6.5 Make written procurement recommendations to the approval delegate after considering advice of panel.
7. Maintain effective accountability and transparency in procurement decision making	7.1 Maintain records, including plans and sub-plans, to provide an effective audit trail of decisions taken throughout the procurement process. 7.2 Maintain compliance with jurisdictional and organisational procurement reporting requirements. 7.3 Maintain records to provide aggregate procurement reporting requirements internal and external to the organisation.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC508A Make procurement decisions.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM013 Make procurement decisions

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- writing a business case
- reading and applying complex documents, including contracts, legislation and guidelines
- providing feedback
- resolving complicated procurement issues
- developing options for inclusion in a business case
- applying decision-making processes or methodologies
- undertaking research and business analysis
- documenting procurement decisions
- managing and updating procurement plans
- maintaining currency in best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- operate organisational IT systems

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to procurement, including environmental purchasing and corporate social responsibility guidance

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- organisational procurement policies, practices and approval processes
- procurement planning for complex procurement requirements and outcomes
- decision-making processes and methodologies
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- government procurement environment
- legal requirements of government procurement
- implications of particular procurement arrangements
- whole-of-life considerations
- financial and accounting issues relevant to the procurement
- cultural issues relating to complex procurement and industry development in certain sectors
- relationship management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM015 Conduct and manage coordinated procurement

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC510A Conduct and manage coordinated procurement. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to identify and use existing coordinated procurement contracts (CPC) and cooperative procurement arrangements (CPA) to establish new CPAs across agencies and to arrange for organisations to procure under these contracts and arrangements.

This unit applies to those working in the public sector with responsibility for arranging the procurement of goods and services.

The skills and knowledge described in this unit must be applied within the legislative, and regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, whilst performing complex tasks in a range of familiar contexts.

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

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Competency Field

Procurement

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Identify applicable existing CPCs, CPAs and opportunities	1.1 Investigate availability and opportunities of CPCs and CPAs. 1.2 Identify and evaluate existing contracts at whole-of-government level and cross-agency arrangements. 1.3 Identify contract terms and assess conditions relating to contracts to determine whether the contract is relevant to the agency concerned. 1.4 Document criteria to identify applicable contracts and compliance with requirements for use.
2. Arrange for organisation to procure under CPCs and CPAs	2.1 Provide information and education about the contract and the requirement for its use to relevant staff. 2.2 Establish procedures to ensure that procurements are made under a CPC or CPA wherever possible, and place orders according to contract terms and conditions. 2.3 Record contractual dealings and report according to contract requirements including expenditure and realised savings.
3. Lead cooperative procurements	3.1 Obtain agreement of management for procurement where no CPAs exist, which would benefit multiple agencies 3.2 Develop a procurement strategy, procurement plan involving other agencies and procurement documents. 3.3 Undertake procurement process, evaluate responses and negotiate contract via cross-agency team. 3.4 Document new CPA and distribute to other agencies

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

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Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC510A Conduct and manage coordinated procurement.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM015 Conduct and manage coordinated procurement

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with stakeholders
- using conceptual and reasoning skills to develop concise arguments
- writing reviews, reports, submissions and other complex documents
- applying decision-making processes and methodologies
- reading and applying the content of complex contracts, legislation and guidelines
- undertaking research and business analysis

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state/territory and local government legislation, policies, practices and guidelines relating to conducting and managing coordinated procurement, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- risk management procedures
- probity principles and issues
- best practice examples in procurement practice
- risks associated with financial and accounting issues relevant to conducting and managing coordinated procurement

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- WHS, environmental, sustainability and corporate social responsibility practices in the context of conducting and managing coordinated procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM016 Plan and implement strategic sourcing

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC511 Plan and implement strategic sourcing. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to plan and implement strategic sourcing for goods or services essential or critical to an organisation's ability to conduct its core business. It includes developing a procurement profile of the buying organisation, conducting strategic assessment of the supply market, developing strategies to source goods or services from the market and securing, monitoring and reviewing strategic market sources.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously consulting others as required, performing sophisticated tasks in a range of familiar contexts.

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

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Competency Field

Procurement

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Develop a procurement profile of the buying organisation	1.1 Gather and analyse long term data about the strategic implications related to the buying organisation's level of spend on various types of goods and services, including how, where and from whom the goods or services are procured. 1.2 Profile the organisation's existing suppliers, with particular emphasis on each supplier's capability and capacity, vulnerability, and adherence to Corporate Social Responsibility (CSR) principles, WHS, legislative compliance, market position and ownership structure. 1.3 Identify and engage relevant communication strategies to engage internal, external and market stakeholders. 1.4 Assess the buying organisation's market position (how the market views the organisation as a potential customer). 1.5 Identify and consider opportunities and risks associated with developing a stronger market position as a buyer.
2. Conduct strategic assessment of the supply market	2.1 Gather and analyse market information to determine capacity, competition, legislative and regulatory compliance, vulnerabilities and risk within the supply market. 2.2 Monitor and analyse market trends and emerging changes to the current supply market place. 2.3 Analyse and assess the supply market's ability to meet the buying organisation's needs, including supply chain management issues. 2.4 Identify and assess innovative and/or creative opportunities within the market. 2.5 Assess local and international supply market factors that may influence the ability to supply goods and services.
3. Develop strategies to source goods or services from the market	3.1 Assess the suitability of current and emerging commercial trends within the market to the needs of the buying organisation. 3.2 Identify and consider the application of commercial best practice models to strategic sourcing activities across the procurement life cycle. 3.3 Identify and test possible benchmarks of better strategic sourcing

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	practice. 3.4 Assess the suitability of alternative market sources of supply. 3.5 Develop strategic supply market plans which reflect analysis of both the buying organisation and the supply market. 3.6 Devise tendering strategies and type of contracting arrangement appropriate to the goods or services being procured and the nature of the supply market which will supply them, taking contract management strategies into consideration. 3.7 Review the application of existing legislation, regulations, policies, practices and procedures to strategic sourcing activities and recommend changes to these where this would yield better results for the buying organisation or at the whole of government level.
4. Secure, monitor and review strategic market sources	4.1 Conduct procurement processes which consider strategic sourcing issues and are appropriate to the goods and services being sought. 4.2 Negotiate with potential suppliers to secure the best supply arrangements. 4.3 Develop and implement transition plans from current to new market sources as needed to ensure a smooth transition and the continuous provision of strategic goods and services to the buying organisation. 4.4 Implement contract management strategies to ensure that goods and services are delivered as contracted. 4.5 Monitor and review new strategic sourcing arrangements for continuous improvement opportunities.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC511 Plan and implement strategic sourcing.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM016 Plan and implement strategic sourcing

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with the supply market, existing contractors and stakeholders
- writing a business case
- conducting market analysis and buying organisation analysis
- gathering and analysing organisational information to build procurement profile, market information and stakeholder requirements, and information on restricted products appropriate to the industry
- identifying, analysing and predicting trends
- applying complex government policy and inter-governmental agreements
- interrogating corporate systems, including Financial Management Information System (FMIS) or asset management system to obtain data
- analysing complex supply chains to identify risk, vulnerability and opportunity
- anticipating and interpreting market reaction
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating procurement plans and sub-plans in line with strategic plans and budgets
- applying complex strategies to development of strategic plans, including corporate, budget and procurement plans and sub plans
- contributing to strategic and risk planning
- developing and managing electronic commerce
- exploiting market opportunities and initiatives in electronic commerce

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Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement, financial management, public sector obligations, consumer law, WHS, social policy and other relevant topics
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR) principles, sustainability and environmental issues as applicable to procurement and market behaviours
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- implications for the organisation and market (suppliers) of key procurement strategies and arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to strategic procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM017 Plan and implement procurement category management

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC512 Plan and implement procurement category management. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to plan and implement procurement category management processes for an organisation.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously consulting others as required, performing sophisticated tasks in a range of familiar contexts.

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

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Competency Field

Procurement

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Plan for category management	1.1 Identify and assess organisational structures and business requirements from corporate planning documents in the context of suitability to adopt category management approaches for procurement and contract management. 1.2 Develop and use effective communication strategies to engage with internal, external and market stakeholders about category management approaches, product and/or services to be category managed and market and supply chain conditions. 1.3 Develop a category management plan based on category management principles for each category to be managed that includes outcome based, transparent and manageable performance metrics for category managed items and services. 1.4 Obtain senior management approval for the category management plan. 1.5 Develop outcome based processes and guidelines to support category management. 1.6 Identify staff skills and training and development opportunities related to category management and incorporate these into professional development plans. 1.7 Identify and interrogate organisational Enterprise Resource Planning (ERP) and document management systems in order to gather and analyse data pertaining to the level of spend on various procurement types.
2. Define categories	2.1 Identify and analyse current procurement options adopted by the organisation and other procurement options that are available in the marketplace. 2.2 Identify market, procurement and contract management trends, opportunities and risks relevant to categories. 2.3 Identify and engage relevant internal stakeholders to assist in defining categories. 2.4 Define procurement categories using a recognised basis. 2.5 Identify and implement appropriate systems to support category and contract managers.

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3. Implement category management	3.1 Develop market strategies for categories and act on them as appropriate to the organisation. 3.2 Implement the category management plan. 3.3 Implement strategies to manage and maintain productive relationships with identified suppliers. 3.4 Resolve operational issues raised by contract users and suppliers. 3.5 Capture and analyse data from a range of sources about the category performance against the performance metrics on a regular basis and report category performance to appropriate corporate systems. 3.6 Regularly review buying organisation, industry and market category positions to identify trends, opportunities and risks and adjust direction as indicated by the results of the review.
4. Review category management	4.1 Review and monitor performance metrics on a regular basis to ensure efficiency and effectiveness is achieved and maintained in category management processes. 4.2 Consult appropriately with stakeholders, provide performance feedback and recommend corrective or improvement actions as necessary. 4.3 Monitor buying organisation, industry and market performance and ensure organisational strategies are modified where appropriate. 4.4 Monitor staff skills and provide appropriate skilling upgrades.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC512 Plan and implement procurement category management.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM017 Plan and implement procurement category management

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- developing a business case
- interpreting and applying complex documents, including contracts, legislation and policy guidelines
- gather and analyse organisational data, market data and stakeholder requirements
- identifying, analysing and predicting trends
- planning, monitoring and implementing change management strategies
- modelling effective team management approaches
- supporting professional development and learning in team members
- responding to and managing issues that arise
- interrogating corporate systems to obtain data
- analysing complex supply chains to identify risk, vulnerability and legality
- developing effective performance measurement metrics
- documenting procurement planning decisions and anticipated outcomes
- managing and updating procurement plans and sub-plans in line with organisational, strategic and budget planning documents
- applying complex strategies to develop organisational plans, including corporate, budget and procurement plans and sub plans
- maintaining currency of best practice models relevant to procurement, contracting, logistics and enterprise market management and legislation, regulation, policy, government agreements and relevant legal decisions

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Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement and financial management
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR), sustainability and environmental issues as applicable to procurement and market behaviours
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- legal issues and determinations impacting on procurement
- implications for the organisation and for the market (suppliers) of key procurement strategies and/or arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM018 Conduct demand and procurement spend analysis

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC513 Conduct demand and procurement spend analysis. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to manage demand and procurement spend within an organisation.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously with management responsibilities, while performing complex tasks in familiar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Collect and analyse demand and procurement spend data	1.1 Identify and analyse demand patterns (organisational consumption), using a range of data sources and using appropriate breakdowns such as by category, region or time period. 1.2 Identify and analyse procurement spend data, using a range of data sources and using appropriate breakdowns, including by category, region or time period. 1.3 Establish and analyse the relationship between demand, consumption and procurement spend and assess business complexity of the buying organisation based on this analysis. 1.4 Develop product usage profiles and organisational spend profiles. 1.5 Establish causal links for demand and spend patterns through engagement with internal stakeholders and analysis of data. 1.6 Map and analyse processes involved across the whole procurement life cycle to identify potential for efficiencies and improved data gathering. 1.7 Review organisational policies and processes for procurement, asset management and budget, assess the impact of these on demand and/or spend and make recommendations to improve management of demand.
2. Develop and implement demand/spend management strategy	2.1 Develop and implement effective communication strategies to engage internal stakeholders, external and market stakeholders. 2.2 Develop and implement outcome based demand and/or spend management processes across the procurement life cycle. 2.3 Identify and use appropriate systems to support procurement and financial processes. 2.4 Develop and implement processes to control and manage the demand for particular goods and services according to influencing factors. 2.5 Identify staff skills and training and development opportunities related to demand and/or procurement spend management and incorporate these into professional development plans. 2.6 Develop outcome based, transparent and manageable performance metrics to ensure best practice is achieved, whilst satisfying organisational needs.
3. Manage demand/spend	3.1 Review and analyse the market profile, including opportunities to influence or develop the market.

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risks and opportunities	3.2 Identify and assess market dynamics including market cycles, product life cycles and growth and/or decline. 3.3 Assess realistically the desirability and practicality of ongoing market development and undertake market development activities where these are appropriate. 3.4 Identify and consider opportunities and risks associated with managing demand and procurement spend.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC513 Conduct demand and procurement spend analysis.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM018 Conduct demand and procurement spend analysis

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with the market place, contractors and stakeholders
- interpreting complex documents
- gathering and analysing organisational data to build demand and spend profiles, market data, and stakeholder requirements.
- planning, monitoring and implementing change management strategies
- promoting change within the organisation
- measuring and monitoring performance
- celebrating success
- applying the content of complex documents, including contracts, legislation and policy guidelines
- applying complex government policy and inter-governmental agreements
- interrogating corporate systems to obtain data
- analysing complex supply chains to identify risk, vulnerability and opportunity
- interpreting market reaction
- developing effective performance measurement metrics
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating procurement plans and sub-plans in line with strategic plans and budgets
- applying complex strategies to development of strategic plans, including corporate, budget and procurement plans and sub plans
- contributing to strategic and risk planning

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- understanding systems architecture
- identifying needs from ERPs
- exploiting organisational ERPs
- developing and managing electronic commerce
- exploiting market opportunities and initiatives in electronic commerce

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement and financial management
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR) principles, sustainability and environmental issues as applicable to procurement and market behaviours
- complex and strategic planning
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- government procurement environment
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- implications for the organisation and market (suppliers) of key procurement strategies and/or arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to strategic procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCM023 Manage strategic contracts

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPROC607A Manage strategic contracts. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to manage contracts 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.

This unit applies to those working in roles that involve the acquisition of strategic assets.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar and unfamiliar contexts.

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

Competency Field

Procurement

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Manage contract establishment	1.1 Discuss and agree upon requirements of contracts and strategic initiatives with all parties. 1.2 Assign responsibilities for establishing and carrying out procedures to achieve contract outcomes. 1.3 Establish and implement effective communication strategies and processes to assist ongoing communication between internal and external stakeholders and contractors. 1.4 Perform relationship management with all levels of personnel involved in procurement and contract management, within probity boundaries. 1.5 Establish strategic relationships within probity boundaries to improve procurement capability and performance. 1.6 Update risk management plans.
2. Manage contract performance	2.1 Monitor progress of contracts against set targets and performance measures to ensure success of procurement activities. 2.2 Take action to rectify performance where set targets, performance measures and probity requirements are not being met. 2.3 Provide advice and support to solve problems, make improvements and maintain progress. 2.4 Manage disputes promptly according to contractual conditions to achieve resolution and maintain contract performance and progress. 2.5 Seek and negotiate opportunities to continuously improve procurement outcomes with contractors. 2.6 Provide or gain approvals for contract variations that are negotiated and agreed between the parties. 2.7 Provide opportunities for stakeholders and contractors to have input into and receive feedback on progress during the performance of the contract. 2.8 Engage internal and external stakeholders as necessary throughout the life of the contract to maintain progress.
3. Manage contract evaluation	3.1 Evaluate contract performance relative to planned performance measures and in consultation with stakeholders and contractors. 3.2 Undertake dispute resolution where stakeholders and contractors do not agree. 3.3 Detail conclusions against agreed criteria to provide a complete

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	picture of performance of contractors, organisation's procurement processes and value for money. 3.4 Measure performance of strategic initiatives relative to planned outcomes in consultation with industry and other stakeholders. 3.5 Document lessons learnt from evaluations of contracts and strategic initiatives and use to continuously improve future procurement activities. 3.6 Advise contractors and stakeholders of evaluation outcomes.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC607A Manage strategic contracts.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCM023 Manage strategic contracts

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- writing complex documents
- managing teams of expert negotiators in functions identifying and resolving strategic contract management issues
- identifying, assessing and implementing opportunities for performance improvement
- manage strategic procurement contracts, contract management plans and sub-plans

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to managing strategic contracts, including environmental purchasing guidance.
- organisational procurement policies, practices and approval processes
- aspects of law of contract, trade practices law, and commercial law relating to managing strategic contracts
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- government procurement environment
- implications of particular contracting arrangements
- whole-of-life considerations
- cultural issues relating to contract management and industry development

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- relationship management at all personnel levels
- environmental, sustainability and corporate social responsibility principles relevant to managing strategic contracts

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PSPPCY004 Support policy implementation

Modification History

Release	Comments
1	This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages. This unit supersedes and is equivalent to PSPPOL404A Support policy implementation. • Unit code updated • Content and formatting updated to comply with new standards • All PC transitioned from passive to active voice

Application

This unit describes the skills required to identify, implement and monitor relevant policy and report on implementation.

This unit applies to public sector staff and other stakeholders working in a role where they are required to support policy implementation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently. They would perform routine tasks in a range of familiar contexts.

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

Competency Field

Policy

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section.
1. Identify relevant policy	1.1 Identify work situations that are shaped by government or organisation policy. 1.2 Identify and locate policy relating to particular work situations.
2. Implement policy	2.1 Interpret policy to be implemented to identify and plan for change in work practices. 2.2 Identify the implications of policy for individual work practices, confirm and adjust practices to reflect policy requirements. 2.3 Support others affected by policy requirements to accommodate those requirements.
3. Monitor and report on policy implementation	3.1 Gather, record and report information that will assist with the evaluation of the effectiveness of policy implementation. 3.2 Gather, record and report information that will assist with evaluation of policy impact on organisational outcomes.

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPOL404A Support policy implementation.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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Assessment Requirements for PSPPCY004 Support policy implementation

Modification History

Release	Comments
1	These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages. • Assessment Requirements created drawing upon specified assessment information from superseded unit

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion:

- reading complex and formal documents and providing information on their application
- preparing accurate written reports with language and structures suited to the intended audience
- working with legislation drafters and legal advisers
- consulting on and preparing policy guidelines
- adjusting communication to suit different audiences
- gathering and analysing policy feedback

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- practices and procedures for developing policy guidelines
- policy feedback mechanisms
- current organisation policies
- government policies and international policy obligations that impact on organisation policy
- organisation and government procedures and protocols
- public sector codes of ethics and code/s of conduct

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Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623

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PUACOM008 Develop and organise public safety awareness programs

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required to develop, implement and evaluate public safety awareness programs. It includes determining scope of program and developing, implementing and evaluating the effectiveness of public safety awareness programs.

The unit is applicable to personnel who formally liaise with other organisations to increase response effectiveness and community safety.

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

Pre-requisite Unit

The fire sector is those sections of government departments, statutory authorities or organisations that have responsibility under jurisdictional arrangements for the delivery of firefighting and fire management services.

It is essential that the prerequisite units listed below are obtained prior to the issuance of this unit to individuals within the fire sector or the units contributing to the attainment of a fire qualification.

PUACOM006 Plan and conduct a public awareness program

Competency Field

Community Programs

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential	Performance criteria describe the performance needed to

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outcomes.	demonstrate achievement of the element.
1 Determine scope of program	**1.1** Research and analysis is undertaken to determine need for a public safety awareness program
	1.2 Target audience and characteristics are defined to inform public safety awareness program planning
	1.3 Public safety awareness program aims and objectives are specified and performance measures are identified
2 Develop program	**2.1** Program type, implementation and support requirements to meet needs of target audiences and organisational objectives is determined
	2.2 Sponsorship and/or joint venture opportunities are investigated to maximise public safety awareness program effectiveness
	2.3 Resource options to implement public safety awareness program are developed and preferred options are selected
	2.4 Resources are accessed to develop public safety awareness program
	2.5 A pilot public safety awareness program is conducted and its effectiveness is assessed and changes are made, as required
3 Implement program	**3.1** Constraints and opportunities for implementing public safety awareness programs are identified
	3.2 Production of resources is managed to ensure that relevant materials are available in sufficient quantities
	3.3 Public safety awareness program is managed to meet agreed performance indicators within budget
	3.4 Ongoing monitoring of public safety awareness program is undertaken during implementation phase
4 Evaluate effectiveness of program	**4.1** Public safety awareness program evaluation is conducted against performance measures
	4.2 Adjustments are made to public safety awareness program to reflect evaluation outcomes and feedback received

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Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUACOM008B Develop and organise public safety awareness programs.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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Assessment Requirements for PUACOM008 Develop and organise public safety awareness programs

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- designing and managing public safety awareness program
- determining and applying performance measures
- determining scope of public safety awareness program
- developing public safety awareness program
- evaluating effectiveness of public safety awareness program
- following organisational policies and procedures including Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- implementing public safety awareness program
- meeting public safety awareness program budgeting requirements
- researching and analysing public safety awareness program needs
- using educational support materials

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions and includes knowledge of

- application of performance measures
- current principles and practices relating to developing public education programs
- educational principles
- materials and resources required for public safety awareness programs
- organisational documentation, policies and procedures including Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- public safety awareness program constraints
- research and analysis for public program development
- target audiences

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Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational procedures, industry standards, regulations, equipment specifications, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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PUAFER001 Identify, prevent and report potential facility emergency situations

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required by occupants to identify and prevent the development of facility emergency situations or to minimise their consequences, and to report if emergency protection systems and/or equipment is compromised.

It applies to a broad range of emergencies and covers the work required before an emergency services and/or specialist response team arrives; it does not include the specific use of equipment to prevent facility emergency situations.

The unit has been developed to cover facilities as specified in Australian Standard 3745 and AS 4083. For this unit, as covered by AS 3745 and/or AS4083, occupants are people attending a facility on a permanent or temporary basis such as an employee, contractor, student or resident, but not a visitor or patient and a facility is a building, structure or workplace that is, or may be, occupied by people (occupants).

All aspects of the unit must be undertaken in accordance with legislative requirements, organisational policies and procedures and approved safe practices. It applies to occupants who are required to be ‘emergency aware’ in their facility.

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

Pre-requisite Unit

Not applicable.

Competency Field

Facility Emergency Response

Unit Sector

Public Safety

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Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1 Identify, monitor and report situations that could lead to facility emergencies	**1.1** Situations that could lead to facility emergencies are identified by the occupant and facility emergency response procedures are followed
	1.2 Immediate work area and/or public area is routinely checked for situations that could lead to emergencies
	1.3 High risk activities are monitored to ensure precautions and facility emergency response procedures are followed
2 Identify, report and correct situations that could prevent facility emergencies from being safely handled	**2.1** Relevant emergency protection systems and equipment are identified
	2.2 Situations that could lead to emergency protection systems and equipment being impaired are identified
	2.3 Immediate work area is routinely checked for situations that could lead to emergency protection systems and equipment being made inoperable and results of check are reported

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

high risk activities must include three or more of the following relevant to the facility	• handling dangerous goods and hazardous materials including waste • handling gases

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	• hot work • manual handling • manufacturing • using, mixing and/or moving chemicals • working around traffic • working at heights, in confined spaces, in poorly ventilated spaces or around noise - subject to permit • working with plant and machinery • working with unstable equipment or equipment that has deteriorated
emergency protection systems and equipment must include three or more of the following relevant to the facility	• access, egress and paths of travel • alarm initiation devices • any specific dangerous good and/or hazardous chemical antidotes and treatment e.g. corrosives • automatic fire, leak, spill or movement detectors • escape equipment • exit signs and emergency lighting • facility emergency response procedures contained within the facility emergency plan • fire or smoke detection, • fire or smoke doors, fire walls • first aid kits • initial response firefighting equipment • occupant warning and communications systems • shower and eyewash • special hazard identification systems • spill or leak containment equipment • suppression systems
situations that could lead to emergency protection systems and equipment being impaired must include three or more of the following relevant to the facility	• emergency equipment not being maintained • emergency lighting and/or exit lighting being damaged, missing • impairing exits and/or pathways to exits • inability to access emergency equipment • inappropriate or non-compliant storage and/or handling of dangerous goods • interfering with alarm systems • not replacing or replenishing used emergency equipment • not reporting damage to emergency

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equipment or facilities
- propping open fire or smoke doors

Unit Mapping Information

This unit replaces and is equivalent to PUAWER001B Identify, prevent and report potential facility emergency situations.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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Assessment Requirements for PUAFER001 Identify, prevent and report potential facility emergency situations

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions on at least one occasion and includes

- communicating with team members and stakeholders
- identifying and reporting situations in a facility that reduce the effectiveness of emergency protection systems and equipment
- identifying emergency protection systems and equipment present in a facility
- identifying, monitoring and reporting situations that could lead to emergencies in a facility

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions and includes knowledge of

- basic types emergency protection systems and equipment
- principles of operation and limitations of emergency protection systems and equipment installed in a facility
- procedures for identifying, minimising, or preventing, and reporting situations within a facility that may lead to an emergency
- safe work practices applicable to a facility that help to prevent emergencies
- situations at a facility that reduce the effectiveness of emergency protection systems and equipment

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

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Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant activities, exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational procedures, facility emergency response procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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PUAFER004 Respond to facility emergencies

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required by occupants to recognise emergencies in a facility, to report emergencies and to take appropriate action during facility emergency situations. It includes preparing for emergency situations, reporting emergencies, responding to emergency warnings and advice, choosing the most appropriate course of action and evacuating from a danger area.

The unit has been developed to cover the facilities as specified in Australian Standard (AS) 3745 and AS4083. For this unit, as covered by AS3745 and AS4083, occupants are people attending a facility on a permanent or temporary basis such as an employee, contractor, student, resident but not a visitor or patient and a facility is a building, structure or workplace that is, or may be, occupied by people (occupants).

All aspects of the unit must be undertaken in accordance with legislative requirements, organisational policies and procedures and accepted safe practices. It applies to occupants who are required to be ‘emergency aware’ in their facility.

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

Pre-requisite Unit

Not applicable

Competency Field

Facility Emergency Response

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential	Performance criteria describe the performance needed to

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outcomes.	demonstrate achievement of the element.
1 Prepare for emergency situations	**1.1** Facility emergency procedures to be used by occupants are identified and followed
	1.2 Emergency resources in a facility are identified and located
	1.3 Emergency response exercises are participated in, in accordance with facility emergency procedures
2 Report emergencies	**2.1** Emergencies are identified and reported, in accordance with facility emergency procedures
	2.2 Occupants in any immediate danger from an emergency or potential emergency are alerted, in accordance with facility emergency procedures
3 Respond to emergency warnings and advice	**3.1** Emergency warnings and advice are responded to, in accordance with facility emergency procedures
	3.2 Instructions from emergency control organisation or attending emergency services are complied with during an emergency
4 Choose most appropriate course of action	**4.1** Emergencies that require evacuation are determined
	4.2 Emergencies that require occupants to shelter-in-place (no evacuation) are determined
	4.3 Shelter or refuge is assessed to determine suitability and sustainability when a shelter-in-place response is the preferred option
	4.4 Emergencies that require lockdown are determined
	4.5 Appropriate cover is assessed when lockdown is required
5 Evacuate from danger area	**5.1** Need to evacuate from danger area is determined and issued under facility emergency procedures
	5.2 Work area is prepared for evacuation, in accordance with facility emergency procedures
	5.3 Area of danger is evacuated, in accordance with facility emergency procedures
	5.4 Where it is safe to do so, assistance is provided to

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occupants who may require it

5.5 Evacuation procedures and instructions from emergency control organisation or emergency response personnel are followed

5.6 Alternative pathways or methods of evacuation are identified, assessed and chosen, in accordance with facility emergency procedures, if usual means of evacuation are blocked or occupants are endangered

5.7 Communication system is used to respond to facility emergencies, in accordance with facility procedures

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUAWER004B Respond to facility emergencies.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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Assessment Requirements for PUAFER004 Respond to facility emergencies

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- applying Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- complying with legislation, industry standards, codes of practice and regulations
- evacuating from work area
- following facility emergency procedures and direction of emergency control organisation members and/or attending emergency services
- identifying and evacuating occupants who may require assistance
- identifying and reporting emergencies
- maintaining own safety and the safety of others in emergency situations
- participating in emergency response exercises including briefings, debriefings, simulations, reviews and desk top drills
- preparing for emergency situations
- responding to emergency warnings and advice
- selecting the most appropriate course of action during an emergency

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria and includes knowledge of

- circumstances where evacuation may need to be modified
- emergency response exercises including participation in briefings and debriefings
- evacuation alarms and facility emergency procedures including action to take when evacuation to a location external to the building might expose evacuated occupants and/or personnel to a greater level of danger
- facility emergency documentation, policies and procedures
- facility emergency reporting systems and procedures facility emergency warning system, signals and instructions
- legislation, industry standards, codes of practice and regulations
- locations of assembly areas and post evacuation actions

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- locations of emergency equipment in a facility
- roles, responsibilities and authority of emergency personnel, emergency control organisations and emergency response teams
- types of emergencies, hazards and evacuation actions associated with each one
- types of occupants who may require assistance
- where Personal Emergency Evacuations Plans (PEEPs) for occupants who have a disability are kept
- Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
  - that reflect emergency situations that may occur in a facility and include shelter in place, partial evacuation and/or full evacuation
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational policies, facility emergency plan, facility emergency response procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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

Modification History

Release 1. This is the first release of this unit of competency in the Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required to implementing and monitoring Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) policies, procedures and safety awareness programs in the work place.

The unit is applicable to personnel who perform legislated or delegated roles within a public safety organisation and who are required to ensure WHS/OHS policy and procedures are implemented in specific teams and/or work groups.

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

Pre-requisite Unit

Not applicable

Competency Field

Work, Health and Safety

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1 Provide WHS/OHS information to work	**1.1** Relevant provisions of Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) legislation and codes of practice are accurately and clearly explained to team and/or work group

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	1.2	Information on organisational WHS/OHS policies, procedures and safety awareness programs are provided and are clearly explained to the team and/or work group
	1.3	Existing hazard information, risk assessment and control procedures are provided and is clearly explained to the team and/or work group
2 Implement and monitor participative arrangements for management of WHS/OHS	**2.1**	WHS/OHS procedures for team and/or work group consultation are implemented and monitored to ensure all members have an opportunity to contribute
	2.2	Issues raised through consultation resolved promptly or are referred to appropriate personnel for resolution, in accordance with organisational procedures
	2.3	Outcomes of consultations are communicated to the team and/or work group promptly
3 Implement and monitor organisational procedures for controlling risks	**3.1**	Existing and potential hazards in the workplace or area are identified and reported, in accordance with organisational procedures
	3.2	Organisational procedures to control risks are implemented and monitored by team and/or work group
	3.3	Existing risk control measures are monitored, and results are reported, in accordance with organisational procedures
	3.4	Existing risk control measures are reviewed, in accordance with the hierarchy of risk control and any variations are reported to designated personnel
	3.5	Inadequate resource allocation for implementation of risk control measures are identified and reported to designated personnel
4 Implement organisational procedures for dealing with hazardous events	**4.1**	Organisational procedures for dealing with hazardous events are implemented, as required, to ensure prompt control action is undertaken
	4.2	Hazardous events are investigated to identify cause of the event, in accordance with organisational procedures
	4.3	Control measures to prevent recurrence and minimise risk of hazardous events are implemented based on the

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		hierarchy of risk control or are referred to designated personnel for implementation
5 Implement and monitor organisational procedure for providing safety awareness training	**5.1**	Safety awareness training needs are identified from specified WHS/OHS competencies currently held by team and/or work group members
	5.2	WHS/OHS training needs are identified, and training arrangements are implemented, in consultation with relevant personnel
6 Implement and monitor organisational procedures for maintaining WHS/OHS records	**6.1**	WHS/OHS records for work place or area are accurately completed, in accordance with organisational requirements
	6.2	Information from WHS/OHS records is used to identify hazards and monitor risk control procedures within work place or area, in accordance with organisational procedures and duty of care responsibilities

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUAOHS003B Implement and monitor the organisation's occupational health and safety policies, procedures and programs.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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

Modification History

Release 1. This is the first release of this unit of competency in the Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- applying Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- communicating information orally and in writing
- completing organisational documentation
- implementing and monitoring participative arrangements for the management of WHS/OHS organisational requirements
- implementing safety awareness programs
- providing WHS/OHS information and organisational policies, procedures and safety awareness programs to team and/or work group
- working with organisational policies and implementing and monitoring organisational procedures for identifying hazards and assessing risks, controlling hazards and risks, dealing with hazardous events, providing safety awareness training and maintaining WHS/OHS records

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria and includes knowledge of

- duty of care obligations and responsibilities
- emergency services including contact details and availability
- hazardous events
- hierarchy of risk control including elimination of hazards, substitute hazard with something safer, isolate hazard from people, reduction of risk through engineering controls, reduction of exposure to hazard using administrative actions and use of personal protection clothing and equipment
- organisational documentation, policies and procedures including implementing accident investigations, completing accident reporting and dealing with hazardous event procedures
- principles and procedures relating to organisational Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) policies and procedures

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- provisions of WHS/OHS legislated requirements
- root cause analysis requirements
- safety awareness programs
- work place or area layout

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational policies and procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf

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RIIVEH305E Operate and maintain a four wheel drive vehicle

Modification History

Release	Comment
1	This unit replaces RIIVEH305D Operate and maintain a four wheel drive vehicle. Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table.

Application

This unit describes the skills and knowledge required to operate and maintain a four wheel drive vehicle in the Resources and Infrastructure Industries.

This unit is appropriate for those working in supervisory and technical specialist roles.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and industry sectors. Relevant information must be sourced prior to application of the unit.

Elements and Performance Criteria

1. Identify four-wheel drive specific terms, terminology and techniques	1.1 Access, interpret and apply four wheel drive vehicle documentation and ensure the work activity is compliant 1.2 Identify the structural and handling differences between a conventional two wheel drive and a four-wheel drive vehicle 1.3 Identify and demonstrate the purpose and use of front wheel hubs 1.4 Identify factors affecting tyre size, fitment, rating, and pressure 1.5 Identify recovery hooks and mounting features 1.6 Identify hazards associated with incorrect use of vehicle features or equipment
2. Plan for minimal environmental impact	2.1 Determine types of impact likely to occur during four-wheel driving activities 2.2 Demonstrate compliance with land management principles and policies when planning exploration activities 2.3 Comply with policies and management plans relevant to the activity area 2.4 Plan and conduct activities in a manner which minimises

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	environmental impact 2.5 Adopt and implement procedures to ensure minimisation of harm to the environment from four-wheel drive activities 2.6 Demonstrate cooperation and consideration towards other land users
3. Perform pre-departure checks	3.1 Perform routine pre-departure checks under the bonnet, under the body, on external and internal items and accessories 3.2 Take action to correct any deficiency 3.3 Determine food and water requirements for journey 3.4 Select navigation equipment 3.5 Interpret weather conditions, determine suitability for driving 3.6 Apply safe vehicle loading practices 3.7 Secure items of personal luggage 3.8 Advise passengers of any special safety precautions to be taken when traversing rough terrain
4. Use four-wheel drive mode	4.1 Operate four-wheel drive both on and off road, in accordance with road rules, principles of four-wheel driving and WHS regulations 4.2 Apply smooth accelerator control strategies over a range of terrain types 4.3 Demonstrate recommended braking techniques for hard top surfaces and off road conditions 4.4 Identify situations where the engagement of four-wheel drive is required 4.5 Engage four-wheel drive mode 4.6 Survey track to identify hazards, asses risk and select a best route 4.7 Select routes to minimise damage to the environment 4.8 Use appropriate range, gear, speed, driving and braking technique, negotiate a range of terrain types whilst maintaining control of vehicle, being aware of contextual/environment issues 4.9 Maintain appropriate hand positioning on steering wheel 4.10 Check brakes and undercarriage after negotiating varying terrain 4.11 Assess and perform repairs to damaged tracks 4.12 Use standard operating procedures when travelling in company with other vehicles
5. Coordinate and	5.1 Apply work procedures to ensure risk assessment, safe

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recover a vehicle	operating practices, and communication requirements are adhered to 5.2 Identify equipment and methods to recover a stuck vehicle 5.3 Identify risks associated with vehicle recovery and develop and implement strategies to minimise risks 5.4 Identify correctly rated recovery equipment and attachment points 5.5 Demonstrate procedures for preparing vehicles for recovery 5.6 Identify techniques to minimise impact on the environment during vehicle recovery 5.7 Coordinate safe recovery of a four-wheel drive vehicle using designated equipment and recovery method 5.8 Perform post recovery checks and report any vehicle or environmental repairs needed 5.9 Return recovery equipment to a reusable condition
6. Perform maintenance and minor repairs on four-wheel drive vehicles	6.1 Select/access maintenance equipment, including spares and fluids, prior to departure, considering contextual issues of the trip 6.2 Check vehicles prior to and regularly during trip, and perform routine maintenance/repair tasks 6.3 Submit vehicle written performance reports 6.4 Demonstrate safe use of a jack to change a wheel on a four-wheel drive vehicle

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit. Further information is available in the Resources and Infrastructure Industry Training Package Companion Volume.

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
RIIVEH305E Operate and maintain a four wheel drive vehicle	RIIVEH305D Operate and maintain a four wheel drive vehicle	Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table.	Not equivalent

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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 RIIVEH305E Operate and maintain a four wheel drive vehicle

Modification History

Release	Comment
1	This unit replaces RIIVEH305D Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table.

Performance Evidence

- Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:
- locates and applies relevant documentation, policies and procedures
- works effectively with others to undertake and complete effective operation and maintenance of a four wheel drive vehicle to meet all required outcomes including:
  - preparing for and organising work activities to meet all task requirements
  - communicating clearly and concisely with others to receive and clarify work instructions
  - using a range of communication techniques and aids to advise others of work activity
- demonstrates completion of the operation and maintenance of a four wheel drive vehicle that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
  - performing pre-departure checks
  - selecting and programming navigation equipment
  - operating a four wheel drive vehicle on and off road
  - applying correct braking techniques according to terrain
  - engaging four wheel drive mode
  - carrying out stop stall key start recovery procedures (only applies to manual licencees)
  - selecting routes and applying techniques to minimise damage to the environment
  - identifying and using multiple types of recovery equipment
  - performing recovery of four wheel drive
  - operating a jack to support a four wheel drive on unstable ground

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Knowledge Evidence

The candidate must demonstrate knowledge of the following when operating and maintaining a four wheel drive vehicle:

- problem solving skills for operation and maintenance of a four wheel drive vehicle
- handover procedures
- technical information, including manufacturer's manuals related to operation and maintenance of a four wheel drive vehicle
- operating vehicles within specifications and limitations
- faults in vehicles and ancillary equipment
- driving techniques and handling characteristics of four-wheel drives in different terrain
- differences between optional four-wheel drive and constant four-wheel drive vehicles and their impacts on vehicle operation and capability
- tyre management principles
- hazards associated with vehicle recovery, including:
  - slopes
  - pot holes
  - power lines
  - wet, slippery conditions
  - mud
  - changes in terrain
  - obstacles such as tree branches or poles
- travelling in convoy
- area restrictions
- knowledge of basic four wheel drive maintenance procedures, including:
  - charging batteries
  - changing fuses and globes
  - jump-starting
  - battery safety

Assessment Conditions

- Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors; and industry regulations for certification and licensing; and,
- this unit must be assessed in the context of this sector's work environment; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other units of competency; and,

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- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this unit of competency, and through the minimum years of current* work experience specified below in an industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an industry subject matter expert. The industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or industry sector as follows:

Industry sector	AQF** Level	Required assessor or industry subject matter expert experience
Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction	1	1 Year
	2	2 Years
Drilling, Coal Mining and Extractive (Quarrying)	3-6	3 Years
Metalliferous Mining and Civil Construction	3-6	5 Years
Other sectors	Where this unit is being assessed outside of the Resources and Infrastructure Sectors, assessor and/or industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and, where no industry standard is specified, should comply with any relevant regulation.	

*Assessors can demonstrate current work experience through employment within industry in a role relevant to the outcomes of the unit; or, for external assessors this can be demonstrated through exposure to industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a qualification the first numeric character in the unit code should be considered to indicate the AQF level.

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Links

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RIIWHS202D Enter and work in confined spaces

Modification History

Release	Comment
1	The unit replaces RIIOHS202A Enter and work in confined spaces.
2	Editorial corrections.
3	Amended Application field.
4	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Application

This unit describes a participant's skills and knowledge required to enter and work in confined spaces in the Resources and Infrastructure Industries.

This unit is appropriate for those working in operational roles undertaking work in confined spaces.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

1 Plan and prepare for working in confined space	1.1 Access, interpret and apply procedures for confined space entry and the environmental management plan and ensure the work activity is compliant 1.2 Obtain, confirm, clarify and apply work instructions and agreed procedure 1.3 Obtain, confirm, clarify and apply safety requirements

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	1.4 Obtain and confirm authorisation (entry permit) meets regulatory requirements 1.5 Confirm the emergency response procedure is with the stand-by person and understood 1.6 Identify, obtain and implement signage and barrier requirements 1.7 Select tools and equipment for the tasks, check for serviceability and rectify or report any faults 1.8 Identify, confirm and apply the environmental protection requirements 1.9 Position rescue equipment by the entry permit
2 Work in confined space	2.1 Gain access to confined space 2.2 Ensure that the atmosphere is tested and monitored for harmful elements 2.3 Correctly apply tagging and lock-out procedures 2.4 Enter the confined space correctly 2.5 Maintain ongoing communication with the stand-by person 2.6 Comply with entry permit requirements 2.7 Monitor and adhere to allocated entry time
3 Exit confined space	3.1 Exit confined space correctly 3.2 Recover tools, equipment and materials 3.3 Conduct inspection of the confined space 3.4 Secure access to the confined space 3.5 Remove tagging and lock-out 3.6 Accurately complete confined space entry permit
4 Clean up	4.1 Clear work area and dispose of or recycle materials 4.2 Clean, check, maintain and store tools and equipment 4.3 Remove, clean and store barriers and signs

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.

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Unit Mapping Information

RIIOHS202A Entering and working in confined spaces

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272

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Assessment Requirements for RIIWHS202D Enter and work in confined spaces

Modification History

Release	Comment
1	The unit replaces RIIOHS202A Enter and work in confined spaces.
2	Editorial corrections.
3	Amended Application field.
4	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant documentation, policies and procedures
- demonstrates completion of entering and working in confined spaces that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
  - obtain appropriate entry permit and instructions for performing work in confined space
  - interpreting and applying safe work method statements
  - apply tagging and lock out
  - selecting, wearing and caring for personal protective equipment applicable to all tasks and environment identified
  - entering the confined space
  - using atmospheric monitoring devices prior to entering the confined space
  - working in the confined space
  - using atmospheric monitoring devices during confined space activity
  - applying safe materials handling methods
  - exiting the confined space
  - remove tagging and lock out

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Knowledge Evidence

The candidate must demonstrate knowledge of enter and work in confined spaces through:

- identifying areas that constitute confined spaces
- complying with site and equipment safety requirements
- complying with the entry and exit procedures, risks and regulations
- types of air contaminants and toxic gases
- identifying the limitations of breathing apparatus
- identifying equipment types, characteristics, technical capabilities and limitations
- complying with site isolation and site control responsibilities and authorities
- locations of safety data sheets (SDS) information and application
- using confined space and Industry terminology

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

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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

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RIIWHS204D Work safely at heights

Modification History

Release	Comments
1	This unit replaces RIIOHS204A Work safely at heights.
2	Formatting corrections.
3	Inserted Application information.
4	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Application

This unit describes a participant's skills and knowledge required to work safety at heights in the Resources and Infrastructure Industries.

This unit it appropriate for those working in operational roles where they are required to perform work at heights.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

1. Identify work requirements	1.1 Access, interpret and apply height safety procedures and ensure the work activity is compliant 1.2 Inspect site to determine layout and physical condition, condition of structures, prevailing weather conditions, equipment requirements and potential hazards

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	1.3 Adhere to WHS requirements 1.4 Identify, select and check safety equipment for serviceability 1.5 Identify, manage and report potential risks and hazards
2. Identify work procedures and instructions	2.1 Consult with authorised personnel to select materials, tools and equipment and check for serviceability 2.2 Select, wear and care for personal protective equipment 2.3 Inspect/install fall protection and perimeter protection equipment 2.4 Identify approved methods of moving tools and equipment to work area and minimise potential hazards associated with tools at heights 2.5 Ensure safety system has been installed correctly 2.6 Select and install appropriate signs and barricades
3. Access and install equipment	3.1 Consult with authorised personnel to ensure anchor fall protection and associated equipment is correctly fitted and adjusted 3.2 Ensure all required equipment is installed 3.3 Use recommended methods to access work area for people, tools and equipment 3.4 Locate tools and materials to eliminate or minimise the risk of items being knocked down
4. Perform work at heights	4.1 Check access from ground to work area and ensure it is safe 4.2 Keep fall equipment in place and adjusted appropriately for movement during work 4.3 Undertake manual handling of materials and equipment 4.4 Locate materials and equipment ensuring that they are safely secured and distributed 4.5 Check safety system periodically for compliance 4.6 Monitor risk control measures to ensure that they are effective and appropriate 4.7 Reassess risk control measures, as required, in accordance with changed work practices and/or site conditions and undertake alterations
5. Clean up work area	5.1 Consult with authorised personnel to ensure safety system is dismantled and removed 5.2 Clear work area and dispose of or recycle materials 5.3 Clean, check, maintain and store tools and equipment

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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

RIIOHS204A Working safely at heights

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272

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Assessment Requirements for RIIWHS204D Work safely at heights

Modification History

Release	Comments
1	This unit replaces RIIOHS204A Work safely at heights.
2	Formatting corrections.
3	Inserted Application information.
4	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant documentation, policies and procedures
- demonstrates completion of working safely at heights that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
  - accessing, interpreting and applying technical and safety information for working at heights
  - assessing hazards and risk associated with working at heights and implement control methods
  - selecting wearing and caring for personal protective equipment
  - identifying required safety systems including fall protection and associated equipment
  - checking that fitting, adjusting and anchoring of fall protection and associated equipment is correct
  - performing work safely at heights

Knowledge Evidence

The candidate must demonstrate knowledge of the following when working safely at heights:

- names and functions of equipment, components and materials

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- complying with equipment manufacturer's instructions and specifications
- safe shifting and handling of tools and materials
- adhering to statutory and regulatory authority requirements
- the nature of work undertaken at heights
- complying with heights safety systems
- the processes of providing for safe working practices
- using safety equipment/systems and considerations to facilitate working safely at heights
- complying with safe work methods

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

Industry sector	AQF** Level	Required assessor or Industry subject matter expert experience
Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction	1	1 Year
	2	2 Years

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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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RIIWHS403D Apply the mine work health and safety management plan

Modification History

Release	Comment
1	The unit replaces RIIOHS403A Apply the mine occupational health and safety management plan.
2	Editorial corrections. Amended Application field.
3	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Application

This unit describes a participant's skills and knowledge required to apply the mine work health and safety management plan within Coal and Metalliferous mining.

This unit is appropriate for those working in supervisory roles where risk needs to be managed.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

1. Identify and interpret the requirements of the Work Health and Safety Management Plan	1.1 Access, interpret and apply the Mine Work Health and Safety Management Plan and ensure the work activity is compliant 1.2 Access, interpret and clarify the Work Health and Safety Management Plan 1.3 Identify, clarify and communicate roles, responsibilities and

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	tasks to others 1.4 Identify, obtain and allocate resources and equipment required for the application of the Work Health and Safety Management Plan 1.5 Identify individual training needs 1.6 Identify, report and review the major hazards, and review established procedures 1.7 Determine appropriate controls for hazards and develop risk control measures 1.8 Identify potential safety, health or hygiene risks
2. Apply Work Health and Safety Management Plan	2.1 Determine requirements of the Work Health and Safety Management Plan 2.2 Assess and communicate the nature and scope of the incidents 2.3 Prepare an action plan in consultation with others to maintain health and safety 2.4 Apply and monitor health and safety plans and procedures 2.5 Apply procedures for monitoring, recording and reporting on hazards
3. Monitor effectiveness of WHS control measures	3.1 Monitor the application of health and safety procedures and control measures 3.2 Monitor the activities of others in relation to any major hazards 3.3 Monitor the use, effectiveness and appropriateness of safety procedures including adequate personal protective equipment, systems and measures 3.4 Monitor systems and procedures for manual and assisted handling 3.5 Monitor the health aspects relevant to work activities and requirements 3.6 Monitor adequacy of control measures and revise where necessary 3.7 Action or recommend changes to improve the health and safety aspects of the job 3.8 Investigate and report any accident or near miss 3.9 Maintain written WHS records of work injury, incidents, health and hygiene issues 3.10 Report verbally and in writing WHS issues which need resolving by others

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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

RIIOHS403A Apply the mine occupational health and safety management plan

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272

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Assessment Requirements for RIIWHS403D Apply the mine work health and safety management plan

Modification History

Release	Comment
1	The unit replaces RIIOHS403A Apply the mine occupational health and safety management plan.
2	Editorial corrections. Amended Application field.
3	Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm.

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant legislation, documentation, policies and procedures
- demonstrates completion of the application of the mine work health and safety management plan that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
  - providing clear and timely instruction and supervision of those involved in applying the mine Work Health and Safety Management Plan
  - identifying and reporting on risks
  - evaluating hazards and reviewing procedures to eliminate or manage hazards
  - determining health & hygiene training needs of site personnel
  - writing an action plan to maintain site health and safety that specifies resources and plans to control established hazards
  - organising activities on site to support the plan requirement
  - applying and monitoring mine site procedures and systems
  - conducting enquiries/investigations and preparing written reports of outcomes
  - recording of injury, incidents and health and hygiene issues

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- accessing, evaluating and applying data from monitoring systems and equipment / plant
- reviewing and auditing site processes and techniques

Knowledge Evidence

The candidate must demonstrate knowledge of the following when applying the mine Work Health and Safety Management Plan:

- relevant legislative and industry WHS standards and compliance requirements
- relevant work processes
- health and hygiene standards
- isolation of plant and equipment techniques
- hazard identification and risk management
- observation and inspection methods
- impacts of drug and substance abuse on fitness for work
- relevant mine hazards associated with:
  - hazardous substances, dusts, noise, vibration
  - the mining processes
  - explosives (where used)
  - high-wall/low-wall failure and water ingress
  - mining equipment and haul roads
- emergency procedure planning and preparation
- conventional signage use

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,

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- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

Industry sector	AQF** Level	Required assessor or Industry subject matter expert experience
Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction	1	1 Year
	2	2 Years
Drilling, Coal Mining and Extractive (Quarrying)	3-6	3 Years
Metalliferous Mining and Civil Construction	3-6	5 Years
Other sectors	Where this Unit is being assessed outside of the Resources and Infrastructure Sectors assessor and/or Industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and where no Industry standard is specified should comply with any relevant regulation.	

*Assessors can demonstrate current work experience through employment within Industry in a role relevant to the outcomes of the Unit; or, for external assessors this can be demonstrated through exposure to Industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a Qualification the first numeric character in the Unit code should be considered to indicate the AQF level

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272

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SIRXSLS001 Sell to the retail customer

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to deliver quality customer service and sell to retail customers. It requires the ability to determine customer needs, match products and services to their needs, and facilitate a sale.

This unit applies to all retail sectors and business sizes from large format stores to small independents. It applies to retail personnel at all levels who play a role in engaging with customers with the purpose of selling.

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

Pre-requisite Unit

Nil

Competency Field

Sales

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Establish customer needs.	1.1. Connect with the customer within designated response times and establish rapport. 1.2. Use questioning and active listening to facilitate effective two-way communication.

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	1.3. Observe and determine appropriate level of interaction based on customer verbal and non-verbal cues. 1.4. Determine and clarify customer preferences, needs and expectations.
2. Provide advice on products and services.	2.1. Use product and service knowledge to tailor options to specific customer needs, and offer alternatives when product is unavailable. 2.2. Clearly explain and promote product and service features and benefits where relevant. 2.3. Advise on promotional events where relevant. 2.4. Provide additional information to address customer questions and objections. 2.5. Offer comparisons to competitor product or service range as required. 2.6. Collaborate with the customer to determine product or service option most suited to their needs. 2.7. Take opportunities to upsell and cross sell products and services that enhance customer request and maximise profitability of sale.
3. Facilitate the sale of products and services.	3.1. Select and use appropriate techniques to close sale. 3.2. Direct the customer to designated point-of-sale and process sale, as required, according to organisational procedures. 3.3. Farewell customer on leaving, and invite to return. 3.4. Provide any required after sales service according to organisational procedures.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

Reading skills to:	• interpret:
	  • detailed in-house and supplier product information documents
	  • plain English documents that outline organisational customer service policy and procedures.

Numeracy skills to:	• interpret basic fee information from in-house documents and complete basic pricing calculations.
Problem-solving skills to:	• respond to customer objections and provide appropriate solutions to satisfy customer needs.
Technology skills to:	• use technologies equipped with search functionality and information systems to source product and service information.

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Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d

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Assessment Requirements for SIRXSLS001 Sell to the retail customer

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- interact with four different retail customers to initiate and close the sale of different retail products or services
- demonstrate the following during the above customer interactions:
  - appropriate communication
  - establishment and clarification of customer needs, wants and expectations
  - product and/or service knowledge
  - appropriate sales approach to sell benefits and features of products and/or services
  - overcome objections and close sales
  - upsell and/or cross sell additional products and/or services that complement the sale
  - promotion of customer loyalty and repeat sales.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- appropriate body language for customer service
- basic principles of positive customer service and sales
- open and closed questioning techniques related to the sale of product and services
- verbal and non-verbal cues indicating customer understanding of information
- techniques for effective communication with customers of diverse backgrounds:
  - cultural diversity
  - special needs
- sales techniques:
  - opening techniques
  - recognising buying signals
  - strategies to focus customer on specific products and services
  - selling add-ons and complementary products
  - overcoming customer objections
  - closing techniques

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- primary components of consumer protection laws that relate to selling products and services, especially organisational responsibility for supplying products and services as described or substituting suitable products and services when unable
- primary components of privacy law, and actions that retail business must take to protect privacy of customer information
- for the specific retail sector:
  - professional service standards and protocols for retail industry personnel
  - attitudes and attributes expected by the retail industry to work with customers
  - different customer service needs and expectations
- for the particular retail organisation:
  - product and service knowledge:
    - product and service range offering
    - product specifications, features and benefits
  - designated response times for providing customer service
  - customer service procedures including recording of and storing customer details.

Assessment Conditions

Skills must be demonstrated in a retail environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant documentation:
  - organisational policies and procedures for:
    - customer service
    - sale of products and services
    - resolving customer complaints
    - collection and storage of customer details
  - organisational product information and price lists
  - supplier brochures, information sheets and price lists
  - promotional activity information
  - current plain English regulatory documents distributed by government regulators for:
    - consumer protection law
    - privacy law
- customers with whom the individual can interact to sell products and services; these can be:
  - individuals in an industry workplace, or
  - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation

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- assessment activities that allow the individual to:
  - work within commercial speed, timing and productivity
  - manage tasks and contingencies in the context of the job role.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d

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SISXFAC003 Implement facility maintenance programs

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to implement a maintenance program for a facility, including monitoring equipment, supplies and assets.

This unit applies to recreation or grounds assistants under supervision in a range of roles and settings in the sport, fitness or recreation industry. This includes providing support in the provision of grounds and facilities maintenance and routine housekeeping in locations such as fitness centres, outdoor sporting grounds or complexes, aquatic centres and community recreation centres. Work is performed according to relevant legislation and organisational policies and procedures.

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

Pre-requisite Unit

Nil

Competency Field

Facility Management

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Identify maintenance program requirements.	1.1 Access relevant organisational maintenance programs for the facility.

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	1.2 Clarify responsibilities with appropriate personnel as required.
	1.3 Identify maintenance schedules and budgets.
	1.4 Offer suggestions that support the effective implementation of the maintenance program.
	1.5 Identify strategies to minimise impact of maintenance activities on facility users.
2. Implement a maintenance program.	2.1 Conduct routine maintenance activities within scheduled timeframes and budgets.
	2.2 Maintain facility function without interruption where possible.
	2.3 Maintain safety of facility users at all times.
	2.4 Respond promptly to requests for maintenance assistance.
	2.5 Research and seek feedback from facility users on effectiveness of maintenance program.
	2.6 Report recommendations to the responsible person, which contribute to the increased efficiency of maintenance.
3. Respond to failed or unsafe equipment.	3.1 Identify faulty equipment and erect clear and noticeable warning signs.
	3.2 Assess failed or unsafe equipment.
	3.3 Perform repairs within designated responsibility.
	3.4 Tag and isolate unsafe equipment, which cannot be repaired within own area of responsibility, promptly.
	3.5 Report unsafe equipment promptly to the responsible person and document as required.
	3.6 Complete reports on all repair work undertaken.
4. Monitor supplies and records.	4.1 Maintain supply and stock levels to ensure ongoing availability.
	4.2 Purchase, receipt, store and issue supplies.
	4.3 Reconcile supply and stocks levels with paperwork and rectify or report discrepancies to nominated person within designated timelines.
	4.4 Maintain supply records and update.
5. Monitor function and value of assets.	5.1 Check condition of assets regularly against criteria to ensure retention of function and value.
	5.2 Respond to identify problems promptly.
	5.3 Determine value of supplies and stock.

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Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret maintenance documentation.
Problem-solving skills to:	• conduct maintenance tasks in the most efficient and cost-effective manner that protects the function and value of assets.

Unit Mapping Information

SISXFAC303A Implement facility maintenance programs

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1ca50016-24d2-4161-a044-d3faa200268b

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Assessment Requirements for SISXFAC003 Implement facility maintenance programs

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- implement facility maintenance programs that meet scheduled timeframes for at least one facility that incorporates:
  - organisational schedules for short and long-term maintenance programs for four of the following facilities and equipment:
    - capital items
    - fittings and fixtures
    - equipment
    - premises
    - plant
    - motor vehicles
    - environment
  - maintenance requests and feedback from facility users
  - budget restrictions
- maintain records according to organisational requirements and manage discrepancies.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- legislation to enable:
  - safe implementation of maintenance operations
  - reporting of unsafe equipment
- organisational policies and procedures to enable maintenance programs to be carried out efficiently, safely and responsibly:
  - isolation procedures for failed or unsafe equipment
  - purchasing and receipting procedures
  - reporting of unsafe equipment
- own responsibilities within maintenance program to enable tasks to be carried out responsibly
- suppliers for specific products, supplies and services

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- purchase specifications to enable the purchase of quality stock
- strategies to minimise disruptions to facility users when carrying out maintenance requirements
- techniques to enable routine maintenance tasks to be completed safely and efficiently
- basic gardening techniques and operations to carry out maintenance schedules as required
- basic principles of supply and demand to ensure optimum stock levels are maintained.

Assessment Conditions

Skills must be demonstrated in:

- a sport, fitness or recreation facility. This can be a workplace or simulated facility.

Assessment must ensure use of:

- a facility for which a maintenance program would be implemented
- organisational policies and procedures on which procedures are based
- reporting documentation
- resources to maintain facility and equipment.

Assessment must ensure access to:

- maintenance equipment
- supplies and stock:
  - first aid
  - pool chemicals (where applicable)
  - office supplies
  - hygiene and sanitary supplies (where applicable)
  - cleaning supplies
  - activity-specific equipment
- organisational policies and procedures in relation to facility maintenance:
  - work health and safety/occupational health and safety
  - documents relating to purchase, receipt, storage and issue
  - record keeping
  - maintenance timeframes and schedules
  - roles and responsibilities of staff
  - isolation and reporting of failed or unsafe equipment
- relevant legislation:
  - work health and safety/occupational health and safety
  - building codes and regulations
  - fire regulations
  - health acts
  - industrial relations

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  - environment legislation
  - local government regulations
  - Australian tax office regulations
- information on equipment safety specifications
- appropriate personnel such as facility managers and supervisors; these can be:
  - personnel in an industry workplace who are assisted by the individual during the assessment process or
  - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessment activities that allow the individual to:

- implement and monitor maintenance of a facility over time.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1ca50016-24d2-4161-a044-d3faa200268b

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SITTGDE001 Interpret aspects of local Australian Indigenous culture

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to share information about a specific local Australian Indigenous culture. It is this localised focus that distinguishes this unit from SITTGDE007 Research and share information on Australian Indigenous cultures.

The unit recognises that there is no single Australian Indigenous culture and emphasises the importance of local cultural knowledge, appropriate behaviour and local community consultation.

This unit applies to those people who are able to share local Australian Indigenous cultural knowledge with others. They may work at many different levels, as cultural knowledge has no direct relationship with organisational levels of responsibility.

The local Australian Indigenous cultural knowledge necessary to achieve competency in this unit may only be accessible to those individuals who identify as elders or who are authorised by local elders on behalf of their communities.

There are many different Indigenous language groups in Australia, therefore the focus of cultural interpretation will vary and should ultimately be decided in consultation with elders on behalf of the local community.

Tour guides, residing anywhere in Australia, are required to undertake training and assessment prescribed by Parks Australia to guide within Kakadu and Uluru–Kata Tjuta National Parks in the Northern Territory.

When working in Queensland, all guides, regardless of their place of residence, are subject to the Queensland Tourism Services Act 2003.

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

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Pre-requisite Unit

Nil

Competency Field

Guiding

Unit Sector

Tourism

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Consult with local Australian Indigenous community.	1.1. Liaise with community members regarding tourism activities, and ways in which cultural information can be used to make these activities authentic to the local area. 1.2. Prepare for and conduct activities according to the needs and wishes of the local Australian Indigenous community. 1.3. Identify potential conflicts with the local Australian Indigenous community and seek solutions.
2. Share information about local Australian Indigenous culture.	2.1. Share an appropriate level of information about aspects of Australian Indigenous culture with customers. 2.2. Advise customers about culturally appropriate behaviour. 2.3. Show respect for Australian Indigenous cultures and values through appropriate behaviour during activities. 2.4. Show customers traditional and contemporary practices when appropriate. 2.5. Use local language and share with customers when appropriate. 2.6. Invite customers to actively participate and share in the Australian Indigenous cultural experience when appropriate.

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Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Writing skills to:	• make notes about Australian Indigenous culture, to share with others.
Learning skills to:	• develop own knowledge and understanding of Australian Indigenous cultures.
Teamwork skills to:	• work effectively with the local Australian Indigenous community or with those who are authorised by elders on behalf of the community with regard to the preparation of appropriate information and activities.

Unit Mapping Information

SITTGDE101 Interpret aspects of local Australian Indigenous culture

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITTGDE001 Interpret aspects of local Australian Indigenous culture

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- liaise with local Australian Indigenous community elders or persons approved by relevant local Indigenous community elders on at least three occasions and in a culturally appropriate manner to identify acceptable protocols for sharing aspects of local Indigenous culture with others
- share information on aspects of local Australian Indigenous culture with customers on at least three different occasions and at three different sites.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- culturally acceptable practices and protocols within a specific local Australian Indigenous community that address:
  - the type of information that can be shared
  - who can give information
  - who can receive the information
  - what activities are appropriate
  - who should be involved in activities
- aspects of a specific local Australian Indigenous culture as appropriate to specific community:
  - art
  - bush foods and medicine
  - dance
  - music
  - storytelling
  - tools and implements
- copyright and intellectual property issues associated with providing information about local Australian Indigenous cultures.

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Assessment Conditions

Skills must be demonstrated in an Australian Indigenous tourism environment. This can be:

- an industry workplace where research is conducted and shared on Australian Indigenous cultures
- a simulated activity involving the researching and sharing of information on Australian Indigenous cultures.

Assessment must ensure access to:

- sites where Indigenous cultural experiences take place:
  - cultural centre
  - gallery
  - natural setting
- involvement of relevant local Indigenous community elders or persons approved by relevant local Indigenous community elders in the assessment process
- customers with whom the individual can interact; these can be:
  - customers in an industry workplace who are assisted by the individual during the assessment process; or
  - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors; and:

- have worked in the tourism industry for at least three years where they have applied the skills and knowledge of this unit of competency.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITTGDE005 Prepare and present tour commentaries or activities

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to construct commentaries or activities and to use effective interpretation and presentation techniques to ensure customer participation and enjoyment in tours or activities. Guides may be presenting generalist or specialist information.

It is relevant in industries where group tours or activities take place in museums, galleries, libraries, places of historical or cultural significance, performing arts centres or zoos; to sport and recreation industries where groups participate in outdoor and adventure activities, such as guided bushwalking; and to any industry that operates tours for business or promotional purposes.

This unit applies in any context where individuals develop and present commentaries or activities that involve creative approaches to the preparation and delivery of information. Guides of all types working independently with limited supervision undertake this role.

Tour guides, residing anywhere in Australia, are required to undertake training and assessment prescribed by Parks Australia to guide within Kakadu and Uluru–Kata Tjuta National Parks in the Northern Territory.

When working in Queensland, all guides, regardless of their place of residence, are subject to the Queensland Tourism Services Act 2003.

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

Pre-requisite Unit

Nil

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Competency Field

Guiding

Unit Sector

Tourism

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Prepare commentaries or activities for presentation to customers.	1.1. Select and evaluate information to meet needs of specific customers, operational contexts and timing restrictions. 1.2. Select or develop themes as a basis for commentaries or activities. 1.3. Construct commentaries or activities to maximise potential for enjoyment and learning. 1.4. Organise support materials in advance of tour or activity. 1.5. Prepare interpretive information tailored to specific audiences.
2. Present commentaries or activities to customers.	2.1. Use interpretive and presentation techniques to combine entertainment and learning to enhance customer experience. 2.2. Present current, accurate and relevant information in a logical order. 2.3. Present information of appropriate depth and breadth using language suited to the group. 2.4. Pace presentation according to timing requirements and operational context. 2.5. Use equipment and resources and identify and report any equipment defects promptly. 2.6. Maintain communication with colleagues as required by specific tour or activity circumstances. 2.7. Implement contingency plans when unexpected events occur and amend presentation format, order or structure to minimise impact on customer enjoyment.
3. Interact with customers.	3.1. Encourage customer participation within safety requirements. 3.2. Invite and respond to questions and feedback, ensuring involvement of whole group.

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3.3. Where the answer to a question is not known, offer to supply the answer at a future time, or refer to other information sources.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• research and analyse potentially complex information and adapt this for effective presentation.
Writing skills to:	• plan and structure cohesive presentations.
Oral communication skills to:	• engage with group members in a positive manner to build rapport.
Teamwork skills to:	• facilitate group participation throughout tour or activity.
Planning and organising skills to:	• structure and time presentations according to tour needs and the demographics of the group.

Unit Mapping Information

SITTGDE304 Prepare and present tour commentaries or activities

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITTGDE005 Prepare and present tour commentaries or activities

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- prepare and present at least three tour commentaries or activities to different groups of customers, which relate to one of the following subject areas:
  - arts
  - built environments
  - history and heritage
  - industrial operations
  - natural environment:
    - flora
    - fauna
    - landscape
  - social environment
  - sport or recreation
- use interpretive and presentation techniques to present commentaries or activities in a manner that:
  - is engaging, entertaining and informative
  - demonstrates knowledge of relevant subject matter
- complete above activities within commercial duration and timeframes that reflect local industry product and practice.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- techniques for structuring commentaries and activities
- subject matter being presented, which will vary according to context, specified in the performance evidence
- role and use of the following presentation and interpretive techniques:
  - body language
  - games and activities
  - humour

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    - positioning
    - role play
    - sensory awareness exercises
    - storytelling
    - visual aids and props
    - voice techniques
- characteristics of customers that can affect their needs in relation to tour activities:
    - age
    - cultural background
    - educational level
    - geographic origin
    - physical factors impacting participation:
        - hearing impairment
        - problems with mobility
        - visual impairment
    - special interests and requested coverage
- appropriate organisational contingency plans to address:
    - changed access arrangements
    - customer health, accident or behavioural issues
    - equipment or system failure
    - natural environment issues.

Assessment Conditions

Skills must be demonstrated in an operational touring environment that reflects the nature of tours commercially available in the relevant city or region. This can be:

- an industry workplace where tour commentaries are prepared and presented
- a simulated activity or role play where tour commentaries are prepared and presented.

Assessment must ensure access to:

- sources of information to prepare commentaries or activities
- organisational specifications:
    - running sheets for tours and activities
    - incident report templates
    - passenger lists
- real or simulated touring activities
- microphone
- props and signage
- customer groups of a size and nature that reflect the commercial environment in which the guide operates

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- participants undertaking a tour or activity for whom the individual can act as guide; participants can be:
  - those participating in a tour or activity who interact with the individual during the assessment process; or
  - individuals who participate in role plays or simulated activities set up for the purpose of assessment in an operational touring context.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors; and:

- have worked in industry for at least three years where they have applied the skills and knowledge of this unit of competency.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITTGDE006 Develop and maintain the general and regional knowledge required by guides

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to research information on Australia and local regions for presentation to customers. It requires broad general knowledge of Australia plus some regional and location-specific knowledge. It highlights the need for ongoing research to update and expand knowledge.

This unit applies to all guides regardless of the context in which they work. Wherever guides are located or travel, they must maintain and expand their general knowledge base as a key professional development activity. In this context, they work independently or under limited guidance from others.

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

Pre-requisite Unit

Nil

Competency Field

Guiding

Unit Sector

Tourism

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.

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1. Research information on Australia and local region.	1.1. Identify subjects of potential customer interest based on direct contact with customers and consultation with industry colleagues. 1.2. Identify key information sources used by guides. 1.3. Evaluate credibility and reliability of information sources. 1.4. Select and use formal and informal research techniques to access current, accurate and relevant information about Australia and local region. 1.5. Obtain information in a culturally appropriate way.
2. Prepare information for guiding activities.	2.1. Identify themes and messages from research to meet specific customer needs. 2.2. Select and organise information to reflect needs of customers and the way in which information may be presented during a guiding activity.
3. Update general knowledge of Australia and local region.	3.1. Identify and use opportunities to maintain currency of general knowledge about Australia and local region. 3.2. Proactively seek opportunities to enhance and expand own knowledge base. 3.3. Incorporate updated and expanded knowledge into guiding activities.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• research and interpret general information on Australia, specific regions and locations.
Writing skills to:	• organise ideas and facts in a logical manner for presentation purposes.
Problem-solving skills to:	• determine what information is relevant to specific guiding contexts.
Self-management skills to:	• take responsibility for ongoing development of knowledge.
Technology skills to:	• use online research systems.

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Unit Mapping Information

SITTGDE305 Develop and maintain the general and regional knowledge required by guides

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITTGDE006 Develop and maintain the general and regional knowledge required by guides

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- undertake research and develop a series of six individual presentations for use in a guiding activity
- individual presentations must:
  - demonstrate broad knowledge of subject area
  - use credible and reliable sources of information
  - relate to different subject areas from the aspects of Australia in general and specific aspects of local region listed in the knowledge evidence
  - incorporate interpretive themes and messages that may be adapted to the needs of different groups
  - organise information in a logical and suitable manner for presentation.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- role of interpretation in creating a powerful customer experience
- information sources frequently used by guides:
  - artworks
  - events
  - exhibitions
  - experiences (of self or others)
  - films
  - images
  - internet
  - music
  - other people:
    - local experts
    - traditional owners
  - performances
  - presentations

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  - professional associations
  - printed texts:
    - books
    - journals
    - magazines
    - newspapers
  - technical information
- aspects of Australia in general and specific aspects of local region covering:
  - agriculture (Australia's history as a primary producer, key products of Australia, current issues, past and current agricultural aspects of the local region)
  - architecture (key buildings, their heritage and current use, and structures both in Australia and the local area)
  - art, theatre, music and literature (key Australian performers, writers and artists, major works by Australians and major cultural events)
  - climate (weather patterns, including any extreme conditions, impact of climate on lifestyle and stories associated with climate in a local area)
  - cultural elements (overview of Indigenous cultures within Australia, different cultures within Australia and the local area, cultural activities and local customs)
  - current events in Australia and the local region
  - economy (overview of current state of the economy, and key features of the local economy and local industry)
  - education (overview of school and higher education systems and comparison of systems to those of other countries or states)
  - flora and fauna (overview of native flora and fauna, their characteristics and key locations)
  - food (local dishes and produce)
  - geography and geology (major land formations, landmarks, natural attractions and their key features for both Australia and the local region)
  - government and politics (general structure, political parties, major political figures, and current federal, state and local political issues)
  - history (historical development of Australia and the local region, major historical events and prominent individuals, key dates and overview of Australian Indigenous history)
  - lifestyle (key features of the day-to-day living patterns of Australians and local people, and family and social customs)
  - natural environment and tourism (how the environment is a tourism asset, impacts of tourism on the environment, and land management in Australia including the role of national parks)
  - religion (religious make-up of Australia and the local area, and aspects of religious practices)
  - science and technology (Australia's contribution both past and present, prominent individuals and key discoveries)
  - shopping (key locations and local products)

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    - sport (main Australian sporting activities, Australia's sporting record, local sporting focus, sporting facilities and sporting comparisons with other countries or areas)
    - trade (key exports and main trading partners)
    - transport (main transport systems, usage of different forms of transport across Australia, and current transport within the local region)
    - tourism services and local facilities of interest to visitors (currency exchange locations, tour booking offices, accommodation, attractions, banks, dry cleaners and medical facilities)
    - wine (Australian wine styles, major wine areas, specific wine areas and wines produced within the local region)
- methods used to organise information:
    - chronologies
    - customer profiles:
        - interest profiles for particular age groups and nationalities
        - special interest groups
    - specific touring route or location information
    - storylines
    - themes or character based note.

Assessment Conditions

Skills must be demonstrated in an operational guiding environment. This can be:

- an industry workplace where research is conducted to update industry knowledge on aspects of Australia in general and specific aspects of the local region
- a simulated industry environment or activity involving a research activity to update industry knowledge of aspects of Australia in general and specific aspects of the local region.

Assessment must ensure access to:

- current sources of information as listed in the knowledge evidence
- equipment used to source, record and store information:
    - computer and software
    - internet
    - data storage equipment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors; and:

- have worked in industry for at least three years where they have applied the skills and knowledge of this unit of competency.

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Links

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SITTGDE010 Prepare specialised interpretive content on cultural and heritage environments

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to research and critically analyse specialised information on cultural and heritage environments to develop interpretive themes and messages. It highlights the need for ongoing research to update and expand knowledge.

This unit applies across many industry sectors and has particular application to guides who work in cultural centres, museums, galleries or historic sites, or who conduct tours in regions with strong cultural and heritage significance. In this context, guides work independently to research and prepare interpretive content.

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

Pre-requisite Unit

Nil

Competency Field

Guiding

Unit Sector

Tourism

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the

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	element.
1. Research specialised information on cultural and heritage environments.	1.1. Identify key sources of specialised information about cultural and heritage environments. 1.2. Evaluate credibility and reliability of information sources. 1.3. Use formal and informal research techniques to access current and relevant information. 1.4. Determine potential subjects of customer interest and make focus of research activities.
2. Prepare specialised information on cultural and heritage environments.	2.1. Analyse information and develop interpretive themes and messages to meet customer needs. 2.2. Organise information to support the ways in which it will be used and presented.
3. Update knowledge of specialised information on cultural and heritage environments.	3.1. Identify and use opportunities to maintain currency of knowledge about specialised topics. 3.2. Proactively seek opportunities to enhance and expand own knowledge base. 3.3. Incorporate updated and expanded knowledge into work activities.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret potentially complex and detailed information on cultural and heritage environments.
Writing skills to:	• make notes on cultural and heritage environments.
Initiative and enterprise skills to:	• establish an interpretive framework • evaluate and adapt information for practical workplace purposes • create key messages, themes and storylines for customers.
Technology skills to:	• use the internet as a research tool.

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Unit Mapping Information

SITTGDE309 Prepare specialised interpretive content on cultural and heritage environments

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITTGDE010 Prepare specialised interpretive content on cultural and heritage environments

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- prepare three different presentations, with each presentation:
  - using at least four credible and reliable sources of information
  - demonstrating knowledge of cultural and heritage environments as listed in the knowledge evidence
  - using appropriate ecological terminology and concepts
  - incorporating interpretive themes and messages
  - organising information in a logical and suitable manner for presentation.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- the role of interpretation in creating a powerful customer experience
- sources of information on cultural and heritage environments
- cultural and heritage environments, natural and built:
  - art galleries
  - cultural centres
  - heritage trails
  - historic localities or regions
  - historic theme parks
  - Indigenous art or occupation sites
  - museums
  - prehistoric and fossil sites
- nature and significance of each cultural or heritage environment:
  - how the environment developed and evolved
  - historically and culturally significant features, details of any exhibits, displays or performances
  - individuals associated with the environment, their roles and impacts
  - role of the environment in the local community, both past and present

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- relationship of the environment to past and current Australian culture and history
- information sources frequently used by guides:
  - artworks
  - events
  - exhibitions
  - experiences and observations (of self or others)
  - films
  - images
  - internet
  - music
  - objects
  - local experts
  - traditional owners
  - performances
  - presentations
  - professional associations
  - printed texts, books, journals, magazines, newspapers
  - technical information.

Assessment Conditions

Skills must be demonstrated in an operational guiding environment. This can be:

- an industry workplace where specialised interpretive content is developed for guiding activities
- a simulated activity involving the development of specialised interpretive content for guiding activities.

Assessment must ensure access to:

- current sources of information as listed in the knowledge evidence
- current interpretive resources
- equipment used to source, record and store information:
  - computer and software
  - internet
  - data storage equipment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors; and:

- have worked in industry for at least three years where they have applied the skills and knowledge of this unit of competency.

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITXCOM002 Show social and cultural sensitivity

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to be socially aware when serving customers and working with colleagues. It requires the ability to communicate with people from a range of social and cultural groups with respect and sensitivity, and to address cross-cultural misunderstandings should they arise.

The unit applies to all tourism, travel, hospitality and event sectors. All personnel at all levels use this skill in the workplace during the course of their daily activities.

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

Pre-requisite Unit

Nil

Competency Field

Communication and Teamwork

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Communicate with customers and colleagues from diverse backgrounds.	1.1. Respect customers and colleagues from different social and cultural groups and treat them with respect and sensitivity. 1.2. Consider social and cultural differences in all

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	verbal and non-verbal communication. 1.3. Respond to others in a non-discriminatory way. 1.4. Make attempts to overcome language barriers. 1.5. Seek help with communication when necessary.
2. Address cross-cultural misunderstandings.	2.1. Identify social and cultural issues that may cause conflict or misunderstanding in the workplace. 2.2. Address difficulties and seek assistance from others when necessary. 2.3. Consider social and cultural differences when difficulties or misunderstandings occur. 2.4. Make efforts to resolve misunderstandings, taking account of social and cultural considerations. 2.5. Escalate problems and unresolved issues to appropriate supervisor or manager for follow-up.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• understand workplace anti-discrimination policies and plain English documents produced by government information agencies.
Oral communication skills to:	• discuss cross-cultural misunderstandings and difficulties with supervisors, managers and other team members and identify possible strategies to resolve them.

Unit Mapping Information

SITXCOM201 Show social and cultural sensitivity

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITXCOM002 Show social and cultural sensitivity

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- communicate in a non-discriminatory way with colleagues and customers from at least three different social and cultural groups:
  - demonstrating attempts to overcome language barriers
  - communicating in line with appropriate social and cultural conventions
  - demonstrating respect and sensitivity
- identify when assistance is required in the above communication, and seek help using the appropriate channels.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key principles of fairness and equity in relation to interaction with colleagues and customers
- key cultural and religious protocols of main social and cultural groups in Australian society, including Australian Indigenous people
- key cultural and religious protocols of main inbound tourist markets to Australia
- different types of disability and their implications for the workplace
- anti-discrimination policies for the industry and specific organisation
- basic aspects of state, territory and commonwealth laws covering anti-discrimination, including requirements to:
  - treat customers and colleagues fairly and equitably
  - not discriminate, show partiality or grant any special favours on the basis of social and cultural attributes
  - not threaten, humiliate or intimidate people because of their social or cultural attributes
- sources of assistance in communicating with colleagues and customers from diverse social and cultural groups:
  - government agencies
  - diplomatic services
  - disability advocacy groups

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    - educational institutions
    - interpreter services
    - local cultural organisations
- approaches to overcoming language barriers in the workplace:
    - communicating through the use of:
        - gestures
        - signs
        - simple words in English or the other person's language
    - giving simple directions
    - giving simple instructions.

Assessment Conditions

Skills must be demonstrated in an operational tourism, travel, hospitality or events environment where communication with socially diverse customers and colleagues takes place. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- current organisational anti-discrimination policies
- plain English documents issued by government regulators that provide information on anti-discrimination laws
- customers and other colleagues from a diverse range of social and cultural groups with whom the individual can interact; these can be:
    - customers and colleagues in an industry workplace who are assisted by the individual during the assessment process; or
    - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITXCOM003 Provide a briefing or scripted commentary

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to deliver information to a group using basic group communication and presentation techniques. Often the information would have been prepared or scripted by others.

The unit applies to individuals in all industry sectors who present information or commentary to a group of people, but who do not require the complete suite of presentation, commentary or public speaking skills. This could include those working in museums, attractions, on aircraft and in any business or community situation where oral communication to a group is required. They could be working under supervision or with guidance from others.

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

Pre-requisite Unit

Nil

Competency Field

Communication and Teamwork

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Present information to group.	1.1. Welcome participants to briefing, information session or tour according to organisational procedures.

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	1.2. Provide participants with information based on scripts and other briefing information. 1.3. Outline environmental and health and safety requirements, and any potential changes to the environment. 1.4. Answer questions in a courteous and friendly manner.
2. Enhance presentation of information.	2.1. Use communication and presentation techniques to enhance participant experience and make adjustments as needed. 2.2. Show cultural and social sensitivity during the presentation. 2.3. Use technical presentation resources as required.
3. Liaise with others.	3.1. Maintain communication with team members and operators to ensure safe and efficient operations. 3.2. Give correct and accurate signals where appropriate.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret information scripts or other briefing information.
Oral communication skills to:	• present cohesive and audible group presentations • interact positively with participants and other team members.
Numeracy skills to:	• address safety considerations and not exceed safe number of participants in a given location.
Problem-solving skills to:	• identify and respond to the need to adjust presentation.
Technology skills to:	• use technology required for briefing or commentary.

Unit Mapping Information

SITXCOM202 Provide a briefing or scripted commentary

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITXCOM003 Provide a briefing or scripted commentary

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- communicate information relating to one or more of the following situations to at least three different groups of people:
  - crowd information session
  - entertainment session
  - product, service or instructional demonstration
  - ride information
  - safety briefing
  - site familiarisation
- use group presentation techniques to enhance each of the above briefings or commentary.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- group presentation techniques:
  - voice projection
  - body language
  - tonal variety
- how to tailor language to meet different group needs
- sustainability considerations relevant to the presentation and venue:
  - conserving resources
  - observing cultural protocols
  - handling waste
  - minimising negative impact
- health and safety requirements for specific events and locations
- emergency procedures for specific events and locations.

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Assessment Conditions

Skills must be demonstrated in an operational tourism, travel, hospitality or events environment where a presentation would take place. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- presentation equipment that supports the briefing or scripted commentary:
  - digital presentations
  - loud speaker
  - microphone
  - monitors
- a group of people to whom the presentation is delivered; these can be:
  - customers in an industry workplace who are assisted by the individual during the assessment process; or
  - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITXHRM002 Roster staff

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to develop, administer and communicate staff rosters. It requires the ability to plan rosters according to industrial provisions, operational efficiency requirements, and within wage budgets.

This unit applies to individuals responsible for developing staff rosters for situations involving potentially large numbers of staff working across a range of different service periods or shifts. It does not apply to small office environments.

It applies to senior personnel who operate independently or with limited guidance from others, including dedicated specialist staff or operational supervisors and managers.

The unit applies to all tourism, travel, hospitality and event sectors.

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

Pre-requisite Unit

Nil

Competency Field

Human Resource Management

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS **PERFORMANCE CRITERIA**

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Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Develop staff rosters.	1.1. Develop rosters according to relevant industrial agreements and other considerations and wage budgets. 1.2. Maximise operational and customer service efficiency while minimising wage costs. 1.3. Combine duties where appropriate to ensure effective use of staff. 1.4. Roster teams with complementary skills mix to meet operational requirements. 1.5. Take account of social and cultural considerations and broader organisational policies that affect staff rosters. 1.6. Consult with colleagues to ensure input into rosters. 1.7. Use roster systems and equipment to administer rosters.
2. Present and communicate rosters.	2.1. Present rosters in required formats to ensure clarity of information according to organisational standards. 2.2. Communicate rosters to appropriate colleagues within designated timeframes.
3. Maintain rostering records.	3.1. Administer records of shift time completed by employees or contractors. 3.2. Maintain staff rostering records according to organisational procedures
4. Evaluate rosters.	4.1. Monitor effectiveness of rosters in consultation with colleagues. 4.2. Identify ways in which rosters and roster development processes may be improved and take appropriate action.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret documents outlining opening and closing times, operational hours, and expected customer traffic.
Writing skills to:	• write potentially complex roster documentation.
Oral communication skills to:	• ask colleagues questions to confirm their requirements • listen, understand and interpret messages.

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Numeracy skills to:	• complete planning activities involving dates, times and staff ratios.
Problem-solving skills to:	• re-work rosters in cases of staff illness.
Teamwork skills to:	• consider staff requests and personal commitments when planning rosters.
Technology skills to:	• use system capabilities and functions of rostering software programs.

Unit Mapping Information

SITXHRM401 Roster staff

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITXHRM002 Roster staff

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- prepare staff rosters that meet diverse operational requirements across three different roster periods
- demonstrate the following when preparing each of the above staff rosters:
  - sufficient staff to ensure the delivery of required services within wage budget constraints
  - appropriate skills mix of the team
  - compliance with industrial provisions and organisational policy
  - completion of rosters within commercial and staff time constraints.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- sources of information on awards and other industrial provisions
- industrial agreements and other considerations which impact the preparation of staffing rosters:
  - single or multiple awards and enterprise agreements
  - award provisions for:
    - leave
    - mandated breaks between shifts
    - maximum allowed shift hours
    - standard, overtime and penalty pay rates
  - overall number of hours allocated to different staff members
  - use of:
    - contractors and consideration of fees
    - permanent or casual staff
- key elements of applicable awards and enterprise agreements:
  - leave provisions
  - mandated breaks between shifts
  - maximum allowed shift hours
  - standard, overtime and penalty pay rates

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- organisational policies which impact the preparation of staffing rosters:
  - sociocultural-friendly organisational initiatives
  - family-friendly workplace initiatives
  - leave for:
    - carers
    - compassionate reasons
    - illness or injury
    - jury service
    - long service
    - maternity or paternity
    - rehabilitation of injured workers
    - study
  - recreation
- industry sector:
  - role of rosters and their importance in controlling staff costs
  - system capabilities and functions of rostering software programs
  - different formats for and inclusions of staff rosters
  - different methods used to communicate rosters, both electronic and paper-based
- specific organisation:
  - social, cultural and skills mix of the team to be rostered
  - full details of human resource policies and procedures that cover leave provisions and socio-cultural issues
  - operational requirements of the business activity, department or event subject to rostering
  - wage budget for the business activity, department or event subject to rostering.

Assessment Conditions

Skills must be demonstrated in an operational tourism, travel, hospitality or events business operation or activity requiring staff rostering. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- computers, printers and rostering software programs
- records of shift time and where relevant electronic equipment used by staff to log commencement and completion time of rostered duties
- applicable industrial awards and enterprise agreements
- operational information about the organisation or department subject to rostering
- information about the cultural and skills mix of a team subject to rostering.

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Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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SITXMPR001 Coordinate production of brochures and marketing materials

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to coordinate the development process for brochures and other marketing materials from a content and production perspective.

The unit applies to all industry sectors and all types of marketing materials, both physical and virtual. Individuals working independently with limited supervision undertake this role. Depending on the business context, this could include sales and marketing personnel, managers, and owner-operators of small businesses.

This unit reflects the general skills needed by those involved in sales and marketing activities and does not include the skills required by professional graphic designers or copywriters.

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

Pre-requisite Unit

Nil

Competency Field

Marketing and Public Relations

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential	Performance criteria describe the performance needed to

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outcomes.	demonstrate achievement of the element.
1. Plan production of brochures and marketing materials.	1.1. Plan production of brochures and marketing materials according to marketing objectives. 1.2. Evaluate factors that impact on nature of materials and development process, including sustainability considerations. 1.3. Create production plans, including timelines, responsibilities, budget and contingency measures.
2. Produce information for inclusion.	2.1. Produce or obtain accurate and complete information for inclusion. 2.2. Present information that promotes the business in a clear format and a culturally appropriate way.
3. Obtain quotations for artwork and printing as appropriate.	3.1. Provide accurate and complete specifications to quoting organisations within appropriate timeframe. 3.2. Obtain quotations with details of potential variations to cost and conditions that may apply.
4. Develop final copy for brochures and marketing materials.	4.1. Develop copy using basic creative writing techniques or obtain from relevant source. 4.2. Integrate accurate, practical and operational details. 4.3. Present accurate information about costs and conditions. 4.4. Check copy for accuracy prior to submission for production.
5. Coordinate production of brochures and marketing materials.	5.1. Liaise with production personnel and monitor schedule. 5.2. Check and correct production work as required. 5.3. Approve artwork according to organisational guidelines. 5.4. Obtain and deliver materials on schedule or action contingency measures.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION

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Reading skills to:	• interpret quotations and product conditions • proofread and edit draft materials • create copy or check quality of outsourced copy • research information for inclusion from varied and potentially unfamiliar sources.
Oral communication skills to:	• collaborate with others on technical, organisational and creative issues.

Numeracy skills to:	• calculate costs and quantities of materials to be produced
	• work with:
	  • numerical concepts of size, shape and layout
	  • detailed product costings.

Problem-solving skills to:	• evaluate factors that impact on production of marketing materials • respond to challenges that arise in the production of marketing materials.
Technology skills to:	• liaise with others about technical production issues • work with current industry marketing technologies.

Unit Mapping Information

SITXMPR401 Coordinate production of brochures and marketing materials

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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Assessment Requirements for SITXMPR001 Coordinate production of brochures and marketing materials

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- produce at least three of the marketing materials listed in the knowledge evidence, coordinating all aspects of the development process within specified deadlines
- produce each of the above marketing materials to:
  - meet stated objectives
  - provide current and accurate information
- proofread each of the above to ensure they are free of errors.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key features of marketing materials:
  - advertising material
  - conference program or registration form
  - destination guide
  - direct mail piece
  - display material
  - event prospectus
  - invitation
  - product brochure
  - product support manual
  - promotional flyer or leaflet
  - venue maps
- objectives of marketing materials and the markets for which material is required
- physical and virtual media marketing opportunities
- factors that impact production of materials in both physical and virtual contexts:
  - accessibility for those with disabilities
  - availability of information
  - design issues:

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    - style
    - size
  - legal requirements
  - marketing considerations:
    - distribution considerations
    - market for review of competitive materials
    - objectives
  - resource constraints:
    - budget
    - in-house capability
  - technology:
    - digital media opportunities
  - objectives of the material
  - sustainability considerations
  - time parameters
- current digital print production technologies, processes and terminology
- printing and industry conventions in relation to placement of information, page numbering and copyright information
- specification inclusions:
  - conditions of contract
  - delivery platform
  - interactivity requirements
  - layout and style of text
  - number of colours
  - number of photographs
  - production and delivery deadlines
  - size
  - total number required
  - type of paper (for print-based materials)
- quality indicators in marketing material production:
  - readability
  - photographic quality
  - effective use of colour
  - spacing requirements
- creative writing techniques used for the content of brochures and other marketing materials
- procedures and requirements for preparation and proofing of material
- copyright laws and restrictions that apply to the inclusion of certain content in brochures and other marketing materials
- procedures for copyright clearance of restricted materials

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- trade practices requirements around the need for accuracy of information in marketing materials.

Assessment Conditions

Skills must be demonstrated in an operational business environment for which brochures and marketing materials can be developed. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- current information and communications technology for the development of content
- suppliers of graphic design services, print production organisations and copywriters with whom the individual can interact; these can be:
  - those in an industry workplace who are assisted by the individual during the assessment process; or
  - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694

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TAEASS301 Contribute to assessment

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to contribute to the assessment process.

It applies to a person with technical or vocational expertise who is in a supervisory or mentoring/coaching work role, and for whom collecting the evidence for assessment is an adjunct to principal work responsibilities. The unit applies to those involved in collecting evidence for assessment against units of competency or accredited courses.

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

Unit Sector

Assessment

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 role and responsibilities in the assessment process	1.1 Discuss and confirm the purpose of the assessment with relevant people 1.2 Discuss and confirm benchmarks for assessment with the qualified assessor 1.3 Access, read and clarify assessment plan with the qualified assessor 1.4 Discuss and agree with the qualified assessor specific responsibilities in gathering evidence, and the 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 the nominated assessment tools and methods for collecting evidence with the qualified assessor, to ensure that the procedures to be followed, and the instruments to be used are clear 2.3 Discuss and confirm with the relevant people the assessment context, including the 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 the assessment process to the candidate, including the different responsibilities of the parties involved, and refer any candidate issues or concerns to the qualified assessor, prior to undertaking assessment activities 3.2 Use assessment instruments to gather quality evidence within the 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 the assessment system's policies and procedures 4.2 Actively seek feedback from the qualified assessor on whether evidence-gathering activities meet the principles of assessment, and whether the evidence collected meets the rules of evidence 4.3 Document areas for improvement in collecting evidence for future assessment 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
Learning	4.2	• Seeks feedback to build knowledge to improve process and professional practice
Reading	1.3, 2.1, 2.2, 2.4, 3.2	• Sources and interprets procedural, and compliance information
Writing	1.1, 1.2, 1.3, 2.1, 2.3, 2.4, 3.2, 4.1, 4.3	• Completes workplace documentation accurately using the appropriate language
Oral Communication	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 3.1	• Communicates information and process requirements clearly, based on techniques appropriate to the audience and environment • Uses appropriate speaking and listening techniques to obtain specific information, and to support the assessment process
Navigate the world of work	2.1, 2.2, 3.2, 4.1	• Accesses, confirms and takes responsibility for adherence to policies, procedures, and legal and ethical requirements
Interact with others	4.2	• Asks questions to clarify understanding, and seeks feedback and further information
Get the work done	3.1, 4.1	• Organises work according to defined requirements, taking some responsibility for decisions regarding the format of information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
TAEASS301 Contribute to assessment	TAEASS301B Contribute to assessment	Updated to meet Standards for Training Packages	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEASS301 Contribute to assessment

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- clarifying the role to be taken during the assessment
- clarifying the assessment plan with the qualified assessor, including agreement about:
  - what evidence will be collected
  - how the evidence will be collected
- carrying out a minimum of three evidence-gathering activities and, on each occasion:
  - document evidence in a clear and concise manner
  - document feedback from others involved in the assessment

reporting findings to the qualified assessor, including an explanation of how the assessment meets the rules of evidence on each of the three occasions.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- competency-based assessment
- the principles of assessment
- the rules of evidence
- the different purposes of assessment
- the diversity of assessment contexts
- different types of evidence
- evidence-gathering methods
- the purpose and features of assessment tools, and assessment plans

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- potential barriers and processes relating to evidence-gathering procedures, and assessment processes
- the organisational policies and procedures relevant to this unit of competency.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to qualified assessors for consultation.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDEL301 Provide work skill instruction

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to conduct individual and group instruction, demonstrate work skills and assess the success of training and one's own training performance, using existing learning resources in a safe and comfortable learning environment.

It emphasises the training as being driven by the work process and context, and applies to a person working under supervision as a work skill instructor in a wide range of settings not restricted to training organisations,

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

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Organise instruction and demonstration	1.1 Gather information about learner characteristics and learning needs 1.2 Confirm a safe learning environment 1.3 Gather and check instruction, demonstration objectives, and seek assistance if required 1.4 Access and review relevant learning resources and learning

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ELEMENT	PERFORMANCE CRITERIA
	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 workplace health and safety (WHS) 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, 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 the learner 3.3 Review relationship between the trainer/coach and the learner, and adjust to suit learner needs
4. Review personal training performance	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

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	4.1	• Reflects on practice to improve
Reading	1.1, 1.3, 1.4, 2.2	• Sources and interprets processes and procedures, learning resources and information relevant to providing a work instruction and delivery
Writing	1.4, 1.6, 2.3, 2.6, 2.8, 3.2, 4.1, 4.2	• Accurately maintains learner records and documentation appropriate to the learning context and audience
Oral Communication	1.1, 1.6, 2.3, 2.4, 2.6	• Uses appropriate communication strategies to engage, build rapport, provide instruction, monitor progress and provide feedback to individuals or groups
Interact with others	1.2, 1.3, 2.1, 2.5, 2.8, 3.2	• Recognises the importance of consultation and negotiation while collaborating to confirm strategy and achieve required outcomes • Asks questions in order to clarify understanding, and to provide and seek feedback • Builds rapport to establish effective working relationships and to achieve effective outcomes
Get the work done	1.1-1.6, 2.1-2.8, 3.1-3.3, 4.1, 4.2	• Organises and completes work according to defined requirements, taking responsibility for some decisions and sequencing tasks to achieve efficient outcomes • Identifies and responds to potential risks, problems and opportunities for improvement and considers options for different approaches

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
TAEDEL301 Provide work skill instruction	TAEDEL301A Provide work skill instruction	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=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDEL301 Provide work skill instruction

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- carrying out a minimum of three training sessions, involving demonstrating and instructing particular work skills for at least two different individuals or small groups, with each session addressing:
  - different learning objectives
  - a range of delivery techniques and effective communication skills appropriate to the audience.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- learner characteristics and needs
- the content and requirements of the relevant learning program, and/or the delivery plan
- the sources and availability of relevant learning resources and learning materials
- the content of relevant learning resources and learning materials
- training techniques that enhance learning, and when to use them
- introductory knowledge of learning principles and learning styles
- key workplace health and safety (WHS) issues in the learning environment, including:
  - roles and responsibilities of key personnel
  - responsibilities of learners
  - relevant policies and procedures, including hazard identification, risk assessment, reporting requirements, safe use of equipment and emergency procedures
  - risk controls for the specific learning environment.

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Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment and include access to any necessary workplace documents.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDEL401 Plan, organise and deliver group-based learning

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1.* Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Application

This unit describes the skills and knowledge required to plan, organise and deliver training for individuals within a group.

It applies to a person working as an entry-level trainer, teacher or facilitator structuring a learning program developed by others in, or with, a training and assessment organisation.

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

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

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

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ELEMENT	PERFORMANCE CRITERIA
	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 plans 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 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 the session plan, modified where appropriate to meet learner needs 4.2 Use the diversity of the group as another resource to support learning 4.3 Employ a range of delivery methods 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 that learning can take place 5.4 Maintain and store learner records 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.

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Skill	Performance Criteria	Description
Reading	1.1, 1.2, 1.3, 2.1, 3.1, 5.1	• Access, read and interpret documentation relevant to the learning context, including program documents, learning materials, policies and procedures relevant to the context
Writing	2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 5.1, 5.2, 5.4	• Develops and maintains workplace documentation accurately and in response to required needs
Oral Communication	1.2, 1.3, 4.1, 4.3, 4.4	• Uses communication techniques to build rapport and explore requirements • Facilitates training in an appropriate style for both individuals and groups
Navigate the world of work	1.4, 5.4	• Recognises and follows organisational protocols, policies and procedures relevant to own role
Interact with others	1.4, 3.3, 4.4, 5.3	• Cooperates and collaborates with others as part of routine activities to achieve team results, and to confirm that outcomes meet requirements • Recognises inappropriate behaviours and the potential for conflict, and implements strategies to maintain an appropriate learning environment
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1-4.4, 5.1-5.4	• Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Identifies and responds to problems and opportunities for improvement and considers options for different approaches • Uses information and communications technology (ICT) based tools to access, organise, analyse and display information relevant to role

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
TAEDEL401 Plan, organise and deliver	TAEDEL401A Plan, organise and deliver	Updated to meet Standards	Equivalent unit

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Code and title current version	Code and title previous version	Comments	Equivalence status
group-based learning	group-based learning	for Training Packages	

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDEL401 Plan, organise and deliver group-based learning

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1.* Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete the tasks outlined in the elements and performance criteria of this unit, including:

- facilitating group-based learning by preparing and delivering at least three training sessions, including:
  - at least two consecutive sessions of at least 40 minutes duration, that follow one of the learning program designs, to a learner group of at least eight individuals
  - at least one session delivered to a learner group of at least eight individuals, with evidence of how the characteristics and needs of this group were addressed
- identifying and responding to individual needs
- accessing and using documented resources, and any support personnel required to guide inclusive practices.
-

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- learning theories and principles
- resources available to identify different learner styles
- the relevant industry area and subject matter of the delivery
- the learner group profile, including characteristics and needs of individual learners in the group
- the requirements of the learning program and/or delivery plan, and the content purpose
- different delivery methods and techniques appropriate to face-to-face group delivery

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- different techniques for the recognition and resolution of inappropriate behaviours
- behaviours that may indicate learner difficulties, and the methods used to address these difficulties
- the purpose of organisational record-management systems and reporting requirements
- evaluation and revision techniques used to improve session plans
- specific resources, equipment and support services available for learners with special needs
- assessment and risk control measures relating to the facilitation of group-based learning
- policies and procedures relevant to the learning environment.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to learning program designs in use in the learning environment.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDEL402 Plan, organise and facilitate learning in the workplace

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1*. Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Application

This unit describes skills and knowledge required to plan, organise and facilitate learning for individuals in a workplace, using real work activities as the basis for learning.

It applies to a person working as an entry-level trainer, teacher or facilitator or an employee, team leader or workplace supervisor responsible for guiding learning through work.

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

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Establish effective work environment for learning	1.1 Establish, and agree upon, the objectives and scope of the work-based learning 1.2 Analyse work practices and routines to determine their effectiveness in meeting established learning objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.3 Identify, and address any workplace health and safety (WHS) 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 the 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 the context for learning and the individual's learning style 3.2 Select an appropriate technique or process to facilitate learning, and explain the basis of the technique to the learner 3.3 Develop, document and discuss an individualised learning plan with the learner 3.4 Access, read and interpret documentation outlining the WHS responsibilities of the various parties in the 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 the work-based learning pathway	4.1 Explain the objectives of work-based learning, and the processes involved, to the learner 4.2 Sequence the introduction of workplace tasks, activities and processes to reflect the agreed work-based learning pathway 4.3 Encourage learner to take responsibility for learning and to self-reflect 4.4 Develop techniques that facilitate the 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, in order to maintain momentum 5.4 Practise ethical behaviour at all times 5.5 Monitor the effectiveness of the learning/facilitation relationship through regular meetings between the parties

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ELEMENT	PERFORMANCE CRITERIA
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 the learner on the outcomes achieved, and the value of the relationship 6.3 Evaluate effectiveness of the work-based pathway against the objectives, processes and techniques used 6.4 Recommend improvements to work-based practice in light of the 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
Reading	1.2, 1.3, 2.1, 3.1, 3.4, 3.5, 6.3	• Accesses and interprets compliance information, contractual information, WHS information, and documents relevant to learning in the workplace, in the context of consultation and continuous improvement, to apply relevance to requirements
Writing	1.1, 2.3, 3.3, 4.1, 6.3	• Develops and maintains documentation relevant to workplace learning, including learning plans and evaluations, in accordance with organisational and workplace requirements
Oral Communication	2.2, 3.3, 4.2, 5.5, 6.1	• Uses oral communication techniques to identify needs, build rapport, agree on learning plans, facilitate effective learning and monitor practice • Selects appropriate vocabulary adjusting language, tone and pace to maintain effective interactions, and to build and maintain engagement with individuals or groups
Navigate the world of work	1.3, 2.1, 5.4	• Follows organisational protocols, policies and procedures in the management of records • Recognises and responds to contractual and ethical requirements associated with own role
Interact with others	1.1, 2.3, 3.5, 4.3, 6.2	• Asks questions to clarify understanding, and seeks feedback and further information • Cooperates and collaborates with others as part of

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		routine activities to achieve team results, and to confirm outcomes meet requirements
Get the work done	1.1-1.3, 2.1-2.3, 3.1-3.5, 4.1-4.4, 5.1-5.3, 5.5, 6.1-6.3	• Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Uses systematic, analytical processes in complex, routine and non-routine situations, gathering information, and identifying and evaluating options based on organisational needs • Identifies and responds to problems and opportunities for improvement, considering options for different approaches • Uses information and communications technology (ICT) based tools to design work processes and to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
TAEDEL402 Plan, organise and facilitate learning in the workplace	TAEDEL402A Plan, organise and facilitate learning 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=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDEL402 Plan, organise and facilitate learning in the workplace

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1*. Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- preparing and facilitating work-based learning
- providing 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
- conducting a learning facilitation relationship:
  - with at least two individuals
  - demonstrating communication skills and flexibility
  - demonstrating one or more of the processes, or techniques, identified.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- systems, processes and practices within the organisation where work-based learning is taking place
- systems for identifying skill needs within the workplace
- different learning styles, and how to encourage learning for those who learn in different ways

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- workplace health and safety (WHS) 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 WHS information.
  -

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to any documentation relating to workplace procedures required by the candidate.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDEL404 Mentor in the workplace

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to establish and develop a professional mentoring relationship with an individual in a workplace.

It applies to workplace supervisors or other work colleagues who work under limited supervision and who have responsibility for mentoring one or more individuals in the workplace. This may include, but is not limited to, those who mentor an apprentice or trainee employed by, or undertaking a work placement within, an organisation.

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

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Develop a mentoring plan	1.1 Identify scope and boundaries of the mentoring relationship according to organisational procedures 1.2 Document mentoring plan in accordance with organisational requirements 1.3 Establish ground rules and negotiate realistic expectations 1.4 Establish and maintain confidentiality of the relationship in

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ELEMENT	PERFORMANCE CRITERIA
	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, and 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 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

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	• Sources and interprets texts relevant to mentoring context, including organisational policies and learner information
Writing	1.1, 1.3, 2.5, 3.1, 3.2, 4.3	• Develops content and documents information relevant to mentoring plan
Oral Communication	2.4, 3.3, 4.1, 4.2, 4.3	• Uses appropriate communication techniques to build rapport, trust, engagement and provide guidance and feedback
Navigate the world of work	1.1, 1.4, 2.6, 4.3	• Follows legislative requirements, organisational protocols, policies and procedures in workplace mentoring
Interact with others	1.2, 2.1-2.3, 2.5, 2.6, 3.1, 3.2, 3.4	• Builds rapport using collaboration with others to achieve joint outcomes and effective interaction • Provides mentoring and role modelling to achieve agreed outcomes • Cooperates and consults with others to clarify understanding and seek feedback
Get the work done	1.1-1.4, 2.1-2.6, 3.1-3.4, 4.1-4.3	• Plans, organises and completes work according to defined requirements taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Identifies and responds to problems, considering options for different approaches

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
TAEDEL404 Mentor in the workplace	TAEDEL404 A Mentor in the workplace	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=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDEL404 Mentor in the workplace

Modification History

Release	Comments
Release1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in elements and performance criteria of this unit, including:

- preparing a mentoring plan between the mentor and mentee that sets out clear objectives for a mentoring relationship that will last at least one year
- facilitating at least three mentoring sessions
- documenting information on sessions, including comments and notes from both mentor and mentee.
-

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- relevant policy, legislation, codes of practice and national standards likely to impact on the provision of workplace mentoring, including training contracts and responsibilities of employer, registered training organisation (RTO) and funding body where they exist
- mentoring methodologies and strategies
- learning theories in relation to mentoring
- strategies for working with a mentee including encouraging self reflection, confidence and the building of rapport
- acceptable behaviour in the mentoring relationship
- equal employment opportunity, equity and diversity principles
- how a mentor can support the mentee's employer to meet its WHS obligations for the mentee.
-

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Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment and include access to:

- documentation of any existing training plan or contract if applicable to the mentoring relationship.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDES401 Design and develop learning programs

Modification History

Release	Comments
Release 2	This version first released with *TAE Training and Education Training Package Release 2.1.* Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Application

This unit describes the skills and knowledge required to conceptualise, design, develop and review learning programs to meet an identified need for a group of learners. The unit addresses the skills and knowledge needed to identify the parameters of a learning program, determine its design, outline the content, and review its effectiveness.

It applies to trainers or facilitators who work under limited supervision to design, or develop, learning programs that are discrete, and provide a planned learning approach that relates to specific learning and training needs, or part of the learning design for a qualification.

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

Unit Sector

Learning design

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Define the parameters	1.1 Clarify the purpose and type of learning program with key

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ELEMENT	PERFORMANCE CRITERIA
of the learning program	stakeholders 1.2 Access and confirm the competency standards, and other training specifications, on which to base the learning program 1.3 Identify language, literacy and numeracy requirements of the program 1.4 Identify and consider characteristics of the target learner group
2. Work within the VET policy framework	2.1 Access relevant vocational education and training (VET) policies and frameworks, and apply to work practices 2.2 Identify changes to training packages and accredited courses, and apply these to program development 2.3 Conduct work according to organisational quality assurance policies and procedures
3. Develop program content	3.1 Research, develop and document specific subject matter content, according to agreed design options 3.2 Evaluate existing learning resources for content relevance and quality 3.3 Specify assessment requirements of the learning program
4. Design the structure of the learning program	4.1 Break the learning content into manageable segments, and document the timeframe for each segment 4.2 Determine and confirm delivery strategies, required assessment methods and tools 4.3 Document the complete learning program in line with organisational requirements 4.4 Review the complete program with key stakeholders, and adjust as required 4.5 Ensure a safe learning progression by analysing risks in the learning environment, and including a risk control 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

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Reading	1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 4.2, 4.4, 4.5	• Interprets specific information and instructions from a range of sources, to identify relevance to requirements
Writing	1.1, 3.1, 3.3, 4.1, 4.2, 4.3, 4.4, 4.5	• Develops documents and content using the required format, accurate spelling, and grammar and terminology specific to the purpose and audience
Oral Communication	1.4	• Uses appropriate language, questioning and listening techniques to provide and elicit information, confirm understanding and explore others' views.
Numeracy	4.1	• Interprets familiar measurements relating to timeframes and compares against requirements
Navigate the world of work	4.3	• Follows organisational protocols, policies and procedures regarding program documentation
Interact with others	1.1, 1.2, 4.2, 4.4	• Recognises the importance of consultation and negotiation while collaborating to confirm strategy and achieve required outcomes
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1-4.5	• Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Identifies and responds to potential risks, considering options for different approaches • Uses information and communications technology (ICT) based tools to conduct research, design work processes, and to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
TAEDES401 Design and develop learning programs	TAEDES401A Design and develop learning programs	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=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDES401 Design and develop learning programs

Modification History

Release	Comments
Release 2	This version first released with *TAE Training and Education Training Package Release 2.1.* Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- designing, developing and reviewing learning programs within the vocational education and training (VET) context
- preparing and developing a minimum of two learning programs:
- that contain differentiated learning program designs to reflect particular needs, contexts and timelines

at least one of which must be based on competency standards or accredited courses, and must cover at least one entire unit of competency or accredited course module.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- information about training package developers and course accreditation agencies responsible for specific learning program parameters
- training packages and relevant competency standards to be used as the basis of the learning program
- other performance standards and criteria to be used as the basis of the learning program, where relevant
- the distinction and relationship between a training package/accredited course, learning strategy and learning program
- the different purposes and focus of learning programs

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- instructional design principles relating to different design options for learning program design and structure
- availability and types of different relevant learning resources, learning materials, and pre-developed learning activities
- methodologies relating to developing and documenting new learning activities, and related learning materials
- different delivery modes and methods
- relevant policies, legal requirements, codes of practice and national standards, including commonwealth and state or territory legislation, that may affect training and assessment in the VET sector
- describe relevant workplace health and safety (WHS) knowledge relating to the work role, and WHS considerations that need to be included in the learning program.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to competency standards or accredited courses relevant to the learning programs.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAEDES501 Design and develop learning strategies

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1.* Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Application

This unit describes the skills and knowledge required to design, develop and review learning strategies.

It applies to those who work under limited supervision and use a range of specialised technical or managerial skills to develop learning strategies relevant to both Training Package qualifications and course-based qualifications.

The learning strategy provides an overview or outline only. Detailed guidance is provided in the content of specific learning programs.

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

Unit Sector

Learning design

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine the	1.1 Clarify the purpose of the learning strategy, likely target

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ELEMENT	PERFORMANCE CRITERIA
parameters of the learning strategy	groups and their learning needs 1.2 Research qualification or other benchmark options for meeting the likely target group needs and select an appropriate option 1.3 Consult with relevant people to confirm the parameters of the learning strategy
2. Develop the framework for the learning strategy	2.1 Develop a learning strategy design that reflects the requirements of the selected qualification or other benchmark 2.2 Analyse industry or organisation documentation to determine additional and supporting requirements 2.3 Research and analyse options for design, based on likely target groups, their learning needs and contexts for delivery 2.4 Use appropriate learning theories and instructional design principles to support the learning strategy design 2.5 Identify and document learning outcomes 2.6 Consult to modify and confirm the framework 2.7 Develop the review process for the learning strategy
3. Devise the content and structure of the learning strategy	3.1 Construct content headings from learning outcomes to form an overview of content to be addressed 3.2 Sequence the content to support learning and determine overall timelines within operating constraints 3.3 Express learning strategy outcomes to reflect both generic and specific learning outcomes to be achieved 3.4 Identify and document appropriate delivery and assessment strategies, taking account of the learning parameters, design framework and learning context 3.5 Identify and document operational requirements
4. Review the learning strategy	4.1 Review the learning strategy in collaboration with relevant people against specified criteria prior to and post implementation 4.2 Document a post-implementation review process that includes measures for identifying the effectiveness and quality of the learning strategy 4.3 Make recommendations based on outcomes of the review processes, where appropriate, and document these 4.4 Make modifications and document as part of a continuous improvement strategy

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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, 2.3, 2.5, 3.4, 3.5, 4.1	• Sources, analyses and interprets written information, including training standards, organisational policies and procedures and review data to identify relevance for learning strategy and continuous improvement
Writing	1.1, 2.1, 2.4, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3, 3.4, 3.5, 4.2, 4.3, 4.4	• Produces documents, including a learning strategy, that incorporates the analysis of information, and is presented in clear and format and style appropriate to audience and context
Numeracy	3.2	• Structures timeframes to represent a sequence of events
Interact with others	1.1, 1.3, 2.6, 4.1	• Recognises the importance of consultation and collaboration to clarify strategy and receive and incorporate feedback
Get the work done	1.1-1.3, 2.1-2.7, 3.1-3.5, 4.1-4.4	• Plans, organises and completes work according to defined requirements taking responsibility for decisions • Identifies and responds to problems and opportunities for improvement and considers options for different approaches • Sequences tasks to achieve efficient outcomes and identifies appropriate process milestones and performance indicators to monitor progress

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
TAEDES501 Design and develop learning strategies	TAEDES501A Design and develop learning strategies	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=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAEDES501 Design and develop learning strategies

Modification History

Release	Comments
Release 2	This was first released with *TAE Training and Education Training Package Release 2.1*. Minor update to Assessment Conditions.
Release 1	This version first released with *TAE Training and Education Training Package Release 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- preparation and presentation of a minimum of two examples of learning strategies designed by the candidate, with differentiated design structures in each that:
  - reflect the specific requirements of the qualification or skill set, and
  - reflect client needs and the contexts of application
- documentation of a review that provides outcomes and evidence of continuous improvement.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- Training Packages, including the content of Training Packages relevant to the learning strategy
- accredited courses and the similarities and differences between them and the skill sets, or qualifications, within training packages
- NVR/AQTF requirements for Registered Training Organisations (RTOs) in terms of their effect on the design, and development, of learning strategies
- The Australian Qualifications Framework (AQF) including:
  - key features of each qualification type
  - AQF pathways policy including credit transfer
- industry and enterprise requirements, including:

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  - those relevant to the learning strategy
  - industry licensing arrangements, where relevant
- the main branches of learning theory incorporating behavioural learning theory, cognitive learning theory, experiential learning theory, information processing theory and current research on learning, as it relates to teaching in an adult environment
- assessment approaches, including:
  - the basis and rationale for different assessment methods appropriate to the learning strategy.
  -

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to NVR/AQTF requirements for RTOs.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAELED803 Implement improved learning practice

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to initiate, and implement, practices that support the improvement of learning strategies in an organisational context. It includes:

- evaluating ways to improve learning practice, managing and monitoring the means by which to improve learning, analysing, and advancing adoption of improved learning practice
- methods for improving learning practice, including developing individual staff members from the perspective of the organisation's needs and imperatives, and enhancing outcomes for learners and candidates.

It applies to leaders or managers who use research, theoretical analysis and professional investigation, to identify ways in which to implement learning practices that build organisational capabilities within a small to medium-sized organisation, or to a significant unit of activity in a large organisation.

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

Unit Sector

Learning and development

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Evaluate ways to	1.1 Review advances in learning practice within a given

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ELEMENT	PERFORMANCE CRITERIA
improve learning practice	vocational, training, educational or content area 1.2 Review and challenge existing learning practice to develop, and test, improved approaches 1.3 Analyse interests, abilities, relationships and the contextual needs of relevant individuals, when promoting improved learning practice 1.4 Research how a range of appropriate learning theories and instructional design principles can improve learning practice 1.5 Ensure learning practice reflects the qualification requirements for nominated qualification/s
2. Manage and monitor the means to improve learning	2.1 Observe and assess learner styles with respect to the appropriateness of current vocational, training and educational learning strategies 2.2 Evaluate the role, and impact of, new technologies on learners and training techniques 2.3 Plan improved learning practice based on how learners currently learn 2.4 Plan improved learning practice based on the experience and personal interests of the learner
3. Analyse and advance the adoption of improved learning practice	3.1 Develop improved vocational, training and educational (VET) learning practice, appropriate to learner characteristics 3.2 Advocate for improved VET learning practice 3.3 Initiate research into improved learning practice 3.4 Design and test improved learning practice in real-world situations 3.5 Mentor colleagues to promote improved learning practice

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	1.1, 1.2, 1.3, 1.4,	• Sources, analyses and interprets written information relevant to learning theories, learning development and

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	1.5, 2.2	continuous improvement, to develop practice
Writing	1.2, 2.3, 2.4, 3.1, 3.2, 3.4	• Produce relevant documentation using appropriate language, style and format, appropriate for the audience
Oral Communication	2.1, 3.2	• Leads verbal exchanges to elicit information, explore requirements and to make recommendations to improve practice
Navigate the world of work	1.4, 3.1	• Develops skills and knowledge of self, and others, related to the role by researching and analysing learning practice
Interact with others	1.3, 3.5	• Collaborates and shares knowledge, and experience with others to develop improved practice
Get the work done	1.1-1.5, 2.1-2.4, 3.1-3.5	• Uses systematic, analytical processes in complex, non-routine situations, gathering information, and identifying and evaluating options based on learner needs • Plans, organises and completes work according to requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Reviews and evaluates effectiveness of practice and products to inform strategic decisions • Uses information and communications technology (ICT) based tools to conduct research, and to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
TAEDEL803 Implement improved learning practice	TAELED703A Implement improved learning practice	Updated to meet Standards for Training Packages	Equivalent unit

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Links

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Assessment Requirements for TAELED803 Implement improved learning practice

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- implementing improved practice in at least one learning environment, including documentation to show:
  - an evaluation of ways in which to improve learning practice
  - how the process was managed and monitored
  - how learning was improved
  - how improved learning practice was advocated for
  - how colleagues were mentored in order to promote learning practice.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- adult learning practice
- contemporary policy and approaches to vocational learning and assessment
- the content and requirements of the relevant delivery and assessment strategies
- the content of learning resources and learning materials
- the design and management of learning objects and content
- different learning styles, and how to encourage learners, including:
  - theoretical learners
  - pragmatic learners
  - activist learners
  - reflective learners
  - kinaesthetic learners
  - audio learners

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  - visual learners
  - tactile learners
  - left and right brain learners
- learning strategies, teaching, and assessment methods
- research relating to pedagogical theory and practice, learner interests and changing learning styles, and the application of information and communications technology (ICT) to learning and teaching
- the sources and availability of relevant learning resources, and learning materials
- the theory and practice relating to adult learning
- training techniques that enhance learning and when to use them, including:
  - instruction and explanation
  - questioning
  - practice
  - written information
  - group, pair and team activities
  - individual activities
  - demonstration.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAELED804 Review enterprise e-learning systems and solutions implementation

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to design, review and implement advanced enterprise electronic learning (e-learning) solutions, as a member of a senior management team. It includes evaluating trends in e-learning in relation to organisational plans, monitoring e-learning resources, and ensuring any proposed solutions are tested, and evaluated, against organisational requirements.

This unit applies to leaders or managers working to ensure learning can enhance individual, team and organisational capabilities.

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

Unit Sector

Learning and development

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 the deployment of information and communications technology (ICT) in education and learning 1.3 Analyse and evaluate integration of ICT for learning and business purposes

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ELEMENT	PERFORMANCE CRITERIA
	1.4 Explore how the convergence of different technologies can affect learning practice
2. Monitor e-learning resource alignment to organisational requirements	2.1 Research trends in teaching methods associated with different types of electronic learning resources 2.2 Determine the 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 appropriate to organisational requirements 2.5 Establish how international e-learning regimes, human resources and learning policies and procedures, will affect the design of e-learning resources
3. Test and evaluate e-learning solutions	3.1 Set the parameters for testing e-learning solutions, 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 the 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

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Reading	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.2	• Sources, analyses and interprets written information, relevant to e-learning and the use of ICT in education and learning, assist with the review of e-learning solutions
Writing	2.3, 2.4, 3.1, 3.3, 3.5	• Produce documents, including policies and procedures, that incorporate the analysis of information, appropriate to audience and context
Oral Communication	2.2, 2.3	• Leads verbal exchanges using appropriate communication techniques to provide and elicit information, explore requirements, and evaluate e-learning systems and solutions
Navigate the world of work	2.4	• Takes responsibility for developing and implementing policies, and procedures that meet organisational requirements
Interact with others	3.5	• Collaborates and consults with others to build knowledge and understanding necessary for product and process evaluation
Get the work done	1.1-1.4, 2.1-2.5, 3.1-3.6	• Uses systematic, analytical processes in complex, non-routine situations, gathering information and identifying and evaluating options based on organisational requirements • Plans, organises and completes work according to requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes • Reviews and evaluates effectiveness of practice and products to inform strategic decisions • Uses ICT-based tools to conduct research, evaluate products, monitor trends and to complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
TAEDEL804 Review enterprise e-learning systems and solutions implementation	TAELED704A Review enterprise e-learning systems and solutions implementation	Updated to meet Standards for Training Packages	Equivalent unit

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Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAELED804 Review enterprise e-learning systems and solutions implementation

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- to analyse trends in e-learning
- monitor and evaluate one e-learning solution set-up for one business need, or the needs of a specified user group
- document, review and evaluate the e-learning resources and policies, and procedures to meet organisational and individual learner needs
- make recommendations for improvements.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- e-learning resources and systems testing and evaluation strategies
- assessment instruments and strategy design
- continuous improvement processes
- information technology principles and terminology, for example, those related to using the internet, reviewing technology capabilities, describing e-learning methodologies, and using related vocabulary
- how to create an effective learning experience using electronic technology
- instructional design for electronic materials, including:
  - systematic instructional strategies
  - learning design principles
  - criterion-referenced assessment
  - the order of increasing difficulty
  - opportunities for the review of material, and repetition
  - need for interactivity

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  - the inclusion of a variety of approaches and techniques for presenting information and activities
  - the structure and sequencing of information
  - what happens if the learner makes a mistake
  - how to get help
  - the techniques to hold a user's attention
  - designing a visual interface for improved learning, including graphics, use of fonts, and white space, and repetitive items
- learning strategy design
- organisational learning theory
- the organisational policies and procedures related to e-learning systems
- quality management compliance requirements
- relevant obligations under the system requirements
- a range of e-learning environments, and their application, in designing e-learning resources.
-

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to an e-learning system.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TAETAS501 Undertake organisational training needs analysis

Modification History

Release	Comments
Release 1	This version first released with *TAE Training and Education Training Package Version 2.0.*

Application

This unit describes the skills and knowledge required to undertake a training needs analysis (TNA) to identify the training and assessment needs of an organisation.

It applies to those working under limited supervision in roles that require them to work with organisations to identify training needs.

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

Unit Sector

Training advisory 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. 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

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ELEMENT	PERFORMANCE CRITERIA
	1.5 Develop a project plan for the conduct of the TNA 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 in the format preferred by the client organisation 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

Foundation Skills

This section 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, 2.3, 2.4, 3.3, 3.4	• Sources, analyses, interprets and follows text-based information relevant to requirements information to apply relevance to requirements •
Writing	1.3, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.4	• Structures documents in a logical, detailed and accurate manner that incorporates information and recommendations using language in a format and style appropriate to a specific audience and context

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Oral Communication	1.1, 1.3, 1.4, 2.1, 2.3, 3.1, 3.2, 3.3, 3.4	• Leads verbal exchanges about information and opinion, using appropriate communication techniques, articulating ideas and observations with a range of individuals and groups • Uses appropriate language to maintain effective communication
Numeracy	2.1, 2.4	• Collates, interprets and compares information relevant to requirements
Navigate the world of work	2.3, 3.4	• Identifies and takes responsibility for adherence to legal requirements and organisational procedures
Interact with others	1.2, 1.5	• Routinely negotiates, consults and builds rapport to obtain broad agreement and input into planning
Get the work done	1.1- 1.5, 2.1-2.4, 3.1-3.4	• Plans, organises and completes work according to requirements, taking responsibility for decisions and sequencing tasks to achieve effective and efficient outcomes • Researches, identifies and responds to problems and opportunities for improvement using systematic, analytical processes • Uses information and communications technology (ICT) based tools to conduct research, analyse data and complete work tasks

Unit Mapping Information

Code and title current version	**Code and title previous version**	**Comments**	**Equivalence status**
TAETAS501 Undertake organisational training needs analysis	TAETAS501B Undertake organisational training needs analysis	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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Assessment Requirements for TAETAS501 Undertake organisational training needs analysis

Modification History

Release	Comments
Release 1	This version first released with TAE Training and Education Training Package Version 2.0.

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- researching, conducting and providing advice through a training needs analysis
- preparing at least two training needs analyses for one, or more organisations, and for each of these demonstrating:
  - the processes that were used to determine the organisation's needs
  - details of the research methods undertaken to identify suitable training and/or assessment
  - planning for the training needs analysis
  - presentations that outline advice and recommendations.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- competency standards, training packages and accredited courses
- NVR/AQTF requirements and standards
- risk identification and management strategies
- industry and enterprise knowledge
- evaluation and research methodologies
- the principles of intellectual property
- training and development strategies
- change management concepts/strategies
- workplace health and safety (WHS) relating to undertaking an organisational training needs analysis.

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Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3

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TLIE4006 Collect, analyse and present workplace data and information

Modification History

Release 1. This is the first release of this unit of competency in the TLI Transport and Logistics Training Package.

Application

This unit involves the skills and knowledge required to collect, analyse and present workplace data and information as part of workplace operations.

It includes identifying required information, analysing and preparing information for use, explaining information and presenting workplace information to others.

Work is performed under general or limited supervision, generally within a team environment.

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

Pre-requisite Unit

Not applicable.

Competency Field

E – Communication and Calculation

Unit Sector

Not applicable.

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1 Collect required data	1.1 Purpose of data and information collection is confirmed

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and information	1.2 Sources of data and information are established
	1.3 Appropriate data and information is identified
2 Prepare data and information for use	2.1 Data and information is collated and analysed in accordance with workplace procedures
	2.2 Data and information are organised and presented in a logical manner
	2.3 Checks for accuracy are made
3 Explain information	3.1 Data and information collection and analysis is explained to others in a way that effectively contributes to workplace operations
	3.2 Outcomes of data and information analysis are presented to others using appropriate presentation modes and resources
	3.3 Questions are answered and appropriate clarification is given
4 Present workplace information	4.1 Information is processed and forwarded to appropriate personnel in accordance with workplace procedures
	4.2 Processed information is collated and stored in accordance with workplace procedures

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions can be found in the Companion Volume Implementation Guide.

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Unit Mapping Information

This unit replaces and is equivalent to TLIE4006A Collect, analyse and present workplace data and information.

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=df441c6e-213d-43e3-874c-0b3f7036d851

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Assessment Requirements for TLIE4006 Collect, analyse and present workplace data and information

Modification History

Release 1. This is the first release of this unit of competency in the TLI Transport and Logistics Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria on at least one occasion and include:

- applying relevant legislation and workplace procedures
- communicating and working effectively with others when collecting, analysing and presenting workplace data and information
- completing relevant documentation
- identifying and using required communications and presentation technology
- monitoring and prioritising work activities in terms of planned schedule
- planning own work including predicting consequences and identifying improvements
- reading, interpreting and following relevant instructions and procedures
- working systematically with required attention to detail.

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria and include knowledge of:

- presentation and communication techniques including barriers to effective communication and how to overcome them
- principles of effective presentation and communication of information
- protocols and procedures for the collection, analysis and presentation of workplace data and information using relevant technology
- relevant procedures and duty of care requirements
- sources of data and information and procedures for processing the information for workplace use
- typical presentation and communications problems, and appropriate action and solutions.

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Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the *Standards for Registered Training Organisations* current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the *Standards for Registered Training Organisations* current at the time of assessment.

Assessment must occur in workplace operational situations where it is appropriate to do so; where this is not appropriate, assessment must occur in simulated workplace operational situations that replicate workplace conditions.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Resources for assessment include:

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, tools, equipment and personal protective equipment currently used in industry
- applicable documentation including workplace procedures, regulations, codes of practice and operation manuals.
-

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=df441c6e-213d-43e3-874c-0b3f7036d851

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BSB Business Services Training Package

Modification History

Release Number	Release Date	Comments
Release 6.1	July 2020	**AISC endorsement of the following BSB components.** **Units of competency** 1 new unit of competency was developed for this *BSB Business Services Training Package* Version 6.1: • BSBWHS332X Apply infection prevention and control procedures to own work activities **The following BSB components were added to *BSB Business Services Training Package* Version 6.1 as part of an SSO upgrade.** Two qualifications were updated to include additional elective units: • BSB30115 Certificate III in Business • BSB30719 Certificate III in Work Health and Safety One skill set was created: • BSBSS00095 Cross-Sector Infection Control Skill Set
Release 6.0	February 2020	**AISC endorsement of the following BSB components.** **Units of Competency** 17 new units of competency were developed for this *BSB Business Services Training Package* Version 6.0: • BSBXBD401 Capture and store big data • BSBXBD402 Test big data samples • BSBXBD403 Analyse big data • BSBXBD404 Use big data for operational decision making • BSBXBD405 Develop procedures for managing big data • BSBXBD406 Present big data insights • BSBXBD407 Protect big data integrity • BSBXBD408 Implement and review procedures for

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		managing big data • BSBXBD501 Develop big data strategy • BSBXCS301 Protect own personal online profile from cyber security threats • BSBXCS302 Identify and report online security threats • BSBXCS303 Securely manage personally identifiable information and workplace information • BSBXCS401 Maintain security of digital devices • BSBXCS402 Promote workplace cyber security awareness and practices • BSBXCS403 Contribute to cyber security threat assessments • BSBXCS404 Contribute to cyber security risk management • BSBXCS405 Contribute to cyber security incident responses **The following BSB components were added to BSB Business Services Training Package Version 6.0 as part of an SSO upgrade.** Eight qualifications were updated to include additional elective units: • BSB30315 Certificate III in Micro Business Operations • BSB42015 Certificate IV in Leadership and Management • BSB41515 Certificate IV in Project Managament Practice • BSB41618 Certificate IV in Business (Procurement) • BSB50215 Diploma in Business • BSB51918 Diploma of Leadership and Management • BSB51415 Diploma of Project Management • BSB51518 Diploma of Business (Procurement) Four skill sets were created: • BSBSS00091 Capture and Present Big Data Skill Set • BSBSS00092 Manage Big Data Skill Set • BSBSS00093 Cyber Security Threat Assessment and Risk Management Skill Set • BSBSS00094 Cyber Security Awareness Skill Set

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Release 5.0	September 2019	**AISC endorsement of the following BSB components.** **Qualifications** Four qualifications were updated from the *BSB Business Services Training Package* Version 4.0: • BSB30719 Certificate III in Work Health and SafetyBSB41419 Certificate IV in Work Health and Safety • BSB51319 Diploma of Work Health and Safety • BSB60619 Advanced Diploma of Work Health and Safety. **Units of competency** 7 new units of competency were developed for this *BSB Business Services Training Package* Version 5.0: • BSBWHS331 Participate in identifying and controlling hazardous chemicals • BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace • BSBWHS512 Contribute to managing work-related psychological health and safety • BSBWHS514 Manage WHS compliance of contractors • BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals • BSBWHS611 Develop and implement strategies that support work-related psychological health and safety • BSBWHS612 Develop and implement a strategy to support a positive WHS culture. 26 units of competency were updated from the *BSB Business Services Training Package* Version 4.0: 25 units supersede and are equivalent to their previous versions: • BSBWHS307 Apply knowledge of WHS laws in the workplace • BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes • BSBWHS309 Contribute effectively to WHS communication and consultation processes • BSBWHS310 Contribute to WHS issue-resolution

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		processes • BSBWHS412 Assist with workplace compliance with WHS laws • BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes • BSBWHS414 Contribute to WHS risk management • BSBWHS415 Contribute to implementing WHS management systems • BSBWHS416 Contribute to workplace incident response • BSBWHS417 Assist with managing WHS implications of return to work • BSBWHS419 Contribute to implementing WHS monitoring processes • BSBWHS513 Lead WHS risk management • BSBWHS515 Lead initial response to and investigate WHS incidents • BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system • BSBWHS517 Contribute to managing a WHS information system • BSBWHS518 Manage WHS hazards associated with maintenance and use of plant • BSBWHS519 Lead the development and use of WHS risk management tools • BSBWHS520 Manage implementation of emergency procedures • BSBWHS521 Ensure a safe workplace for a work area • BSBWHS522 Manage WHS consultation and participation processes • BSBWHS613 Evaluate the WHS performance of an organisation • BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor • BSBWHS616 Apply safe design principles to control WHS risks • BSBWHS617 Apply ergonomics to manage WHS risks • BSBWHS631 Apply occupational hygiene principles to manage WHS risks. One unit supersedes but is not equivalent to its previous

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		version: • BSBWHS418 Assist with managing WHS compliance of contractors. Three units of competency were deleted from the *BSB Business Services Training Package* Version 4.0: • BSBWHS410 Contribute to work-related health and safety measures and initiatives • BSBWHS601 Apply legislative frameworks for WHS • BSBWHS602 Facilitate WHS activities. **The following BSB components were added to *BSB Business Services Training Package* Version 5.0 as part of an SSO upgrade.** 14 qualifications were updated to include updated elective units: • BSB30215 Certificate III in Customer Engagement • BSB30515 Certificate III in Business Administration (International Education) • BSB42315 Certificate IV in Environmental Management and Sustainability • BSB50315 Diploma of Customer Engagement • BSB50515 Diploma of Franchising • BSB50618 Diploma of Human Resources Management • BSB50815 Diploma of International Business • BSB51415 Diploma of Project Management • BSB51518 Diploma of Business (Procurement) • BSB51918 Diploma of Leadership and Management • BSB52015 Diploma of Conveyancing • BSB52115 Diploma of Library and Information Services • BSB52318 Diploma of Governance • BSB61115 Advanced Diploma of Conveyancing. One skill set was created: • BSBSS00090 Auditing Skill Set. Four existing units were updated: • BSBITU111 Operate a personal digital device • BSBRKG603 Prepare a functional analysis for an organisation • BSBSMB421 Manage small business finances

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		• BSBXTW301 Work in a team.
Release 4.0	February 2019	**Units of Competency** Nine new units of competency: BSBXCM301 Engage in workplace communication BSBXCM401 Apply communication strategies in the workplace BSBXCM501 Lead communication in the workplace BSBXDB301 Respond to the service needs of customers and clients with disability BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability BSBXDB501 Support staff members with disability in the workplace BSBXDB502 Adapt organisations to enhance accessibility for people with disability BSBXTW301 Work in a team BSBXTW401 Lead and facilitate a team **Qualifications** Update to elective units within eight qualifications: BSB30115 Certificate III in Business BSB30215 Certificate III in Customer Engagement BSB40215 Certificate IV in Business BSB41015 Certificate IV in Human Resources BSB42015 Certificate IV in Leadership and Management BSB50215 Diploma of Business BSB50618 Diploma of Human Resources Management BSB51918 Diploma of Leadership and Management
Release 3.0	September 2018	**Qualifications** Update to core units within eight qualifications: BSB41618 Certificate IV in Business (Procurement)

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		BSB42518 Certificate IV in Small Business Management BSB42618 Certificate IV in New Small Business BSB50618 Diploma of Human Resources Management BSB51518 Diploma of Business (Procurement) BSB51918 Diploma of Leadership and Management BSB52318 Diploma of Governance BSB61218 Advanced Diploma of Program Management **Units of Competency** Seven new units of competency: BSBCRT404 Apply advanced critical thinking to work processes BSBCRT502 Develop critical thinking in others BSBITU501 Conduct data analysis BSBPRC406 Conduct e-procurement BSBPRC505 Manage ethical procurement BSBWRK311 Develop self-awareness BSBWRK412 Contribute to personal development Updates to 41 units of competency to align content with industry skills needs and standards: BSBEBU511 Develop and implement an e-business strategy BSBFIA412 Report on financial activity BSBITA411 Design and develop relational databases BSBITA611 Configure and optimise customer contact technology BSBITB511 Establish and maintain a network of digital devices BSBITS411 Maintain and implement digital technology BSBITU111 Operate a personal digital device BSBITU112 Develop keyboard skills BSBITU211 Produce digital text documents BSBITU212 Create and use spreadsheets

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		BSBITU213 Use digital technologies to communicate remotely BSBITU311 Use simple relational databases BSBITU312 Create electronic presentations BSBITU313 Design and produce digital text documents BSBITU314 Design and produce spreadsheets BSBITU315 Purchase goods and services online BSBITU422 Use digital technologies to collaborate in the workplace BSBLDR511 Develop and use emotional intelligence BSBLDR513 Communicate with influence BSBMKG534 Design effective digital user experiences BSBMKG535 Devise a search engine optimisation strategy BSBMKG536 Develop strategies to monetise digital engagement BSBMKG537 Develop a social media engagement plan BSBPMG621Facilitate stakeholder engagement BSBPMG622 Implement program governance BSBPMG623 Manage benefits BSBPMG624 Engage in collaborative alliances BSBPRC401 Plan procurement BSBPRC402 Negotiate contracts BSBPRC403 Conduct international procurement BSBPRC501 Manage procurement strategies BSBPRC502 Manage supplier relationships BSBPRC503 Manage international procurement BSBPRC504 Manage a supply chain BSBRES411 Analyse and present research information BSBSMB420 Evaluate and develop small business operations BSBSMB421 Manage small business finances BSBSMB422 Plan small business growth BSBSMB423 Create a digital technology plan for small business

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		BSBWOR424 Develop a time management plan BSBWRK520 Manage employee relations
Release 2.0	January 2016	Includes review of the following sectors: Sustainability (1 new qualification and 6 new units) Governance (1 new qualification and 9 new units) Marketing and Advertising (3 new qualifications and 12 new units) Small Business (2 new qualifications and 6 new units) One new skill set to meet industry requirements: BSBSS00089 Workplace Innovation Skill Set The following qualifications have been moved from CUL11 Library, Information and Cultural Services Training Package version 1 to BSB Business Services Training Package version 2 and have been updated to meet the Standards for Training Packages: CUL30111 Certificate III in Information and Cultural Services CUL40111 Certificate IV in Library, Information and Cultural Services CUL50111 Diploma of Library and Information Services The following qualifications have been moved from TAE10 Training and Education Training Package version 3.4 to BSB Business Services Training Package version 2 and have been updated to meet the Standards for Training Packages: TAE70210 Graduate Certificate in Management (Learning) TAE80210 Graduate Diploma of Management (Learning) Industry Skills Council (ISC) upgrade to update unit lists and correct typographical errors

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Release 1.2	June 2015	Industry Skills Council (ISC) upgrade to correct typographical errors
Release 1.1	April 2015	Industry Skills Council (ISC) upgrade to correct mapping and typographical errors
Release 1.0	March 2015	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 available from 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB30115 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.

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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 people with supervisory or managerial aspirations.

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BSBSS00034 Basic Customer Engagement Skill Set

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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:

- BSB20215 Certificate II in Customer Engagement
- BSB30215 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

BSBITU111 Operate a personal digital device

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Target Group

Customer Engagement staff.

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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business, BSB50515 Diploma of Franchising and BSB51915 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.

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business and BSB50515 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB50515 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40915 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

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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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 BSB40215 Certificate IV in Business and BSB50215 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

BSBINN501 Establish systems that support innovation

BSBINN502 Build and sustain an innovative work environment

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list and Pathways
Release 1	This Skill Set 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 BSB30315 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

BSBCRT402 Collaborate in a creative process

BSBCRT501 Originate and develop concepts

Target Group

Existing workers who have contributed to and helped to implement an innovation system within an organisation.

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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 contribute to an innovative workplace.

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BSBSS00042 Intellectual Property Strategic Management Skill Set

Modification History

Release	Comments
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB50215 Diploma of Business, BSB50515 Diploma of Franchising and BSB60215 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB42015 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB30815 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

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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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 BSB40215 Certificate IV in Business and the BSB40515 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

BSBRES411 Analyse and present research information

BSBWRT401 Write complex documents

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business, and BSB51915 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

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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 fostering innovation at all levels of the workforce.

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BSBSS00047 Medical Transcription Skill Set

Modification History

Release	Comments
Release 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 BSB40215 Certificate IV in Business and the BSB40515 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

BSBRES411 Analyse and present research information

BSBWRT401 Write complex documents

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business, BSB50515 Diploma of Franchising and BSB51915 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

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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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

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

PSPGEN028 Provide a quotation

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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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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

Units in this skill set may provide credit towards BSB30315 Certificate III in Micro Business Operations, BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

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

BSBSMB421 Manage small business finances

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Target Group

Managers and leaders

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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB30315 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB41915 Certificate IV in Business (Governance).

BSBGOV401 Implement Board member responsibilities and BSBGOV402 Work within organisational structure provide credit towards the BSB40915 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

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Target Group

Managers and leaders within Aboriginal and Torres Strait Islander organisations.

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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 in this skill set may provide credit towards BSB30315 Certificate III in Micro Business Operations, BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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

Units in this skill set may provide credit towards BSB30315 Certificate III in Micro Business Operations, BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

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

BSBMKG414 Undertake marketing activities

BSBMKG419 Analyse consumer behaviour

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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB10115 Certificate I in Business.

BSBWOR204 Use business technology provides credit towards the BSB20115 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

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Target Group

Managers and leaders

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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 BSB10115 Certificate I in Business.

FNSFLT201 Develop and use a personal budget provides credit towards the BSB30315 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

BSBITU111 Operate a personal digital device

FNSFLT201 Develop and use a personal budget

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business and BSB50515 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business, BSB42515 Certificate IV in Small Business Management, BSB42615 Certificate IV in New Small Business and BSB50615 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

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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 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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
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 BSB40215 Certificate IV in Business, BSB50215 Diploma of Business and BSB50615 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

BSBRES411 Analyse and present research information

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TAETAS501 Undertake organisational training needs analysis

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 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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 in this skill set may provide credit towards BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBSMB410 Review and implement energy efficiency in business operations

BSBSMB411 Manage specialist external advisory services

BSBSMB420 Evaluate and develop small business operations

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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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways.
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 in this skill set may provide credit towards BSB30315 Certificate III in Micro Business Operations, BSB42515 Certificate IV in Small Business Management and BSB42615 Certificate IV in New Small Business.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBITU422 Use digital technologies to collaborate in the workplace

ICTWEB201 Use social media tools for collaboration and engagement

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 may be used to provide credit towards BSB41915 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
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 BSB42015 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

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Target Group

Developing team leaders and managers within a broad range of enterprise and industry contexts.

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 3	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update unit list.
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 BSB40215 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

TAEDEL404 Mentor in the workplace

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
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 implement diversity policy in the workplace.

Pathways Information

The units provide credit towards BSB51915 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

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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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
Release 1	This Skill Set 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 BSB51915 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 2	This version released with BSB Business Services Training Package Version 2.0. Version created to update Pathways
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 plan a diversity policy in the workplace.

Pathways Information

The units provide credit towards BSB80315 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

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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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BSBSS00069 Archive and Keep Records Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements for individuals who have operational responsibilities with regards to archiving and recordkeeping.

Pathways Information

Units from this skill set can contribute to credit towards BSB31215 Certificate III in Library and Information Services, BSB42115 Certificate IV in Library and Information Services, and BSB52115 Diploma of Library and Information Services.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBRKG305 Review recordkeeping functions

BSBRKG502 Manage and monitor business or records systems

BSBRKG608 Plan management of records over time

BSBLIB302 Develop and apply knowledge of archives

Target Group

This skill set is for people who are responsible for archiving and recordkeeping.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for providing individuals with training in archiving and recordkeeping.

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Custom Content Section

Not applicable.

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BSBSS00070 Cataloguing Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements for people who are responsible for cataloguing resources.

Pathways Information

Units from this skill set can contribute to credit towards BSB31215 Certificate III in Library and Information Services, BSB42115 Certificate IV in Library and Information Services, and BSB52115 Diploma of Library and Information Services.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBLIB305 Use established cataloguing tools

BSBLIB403 Complete a range of cataloguing activities

BSBLIB509 Provide subject access and classify material

BSBLIB605 Analyse and describe specialist and complex material

Target Group

This skill set is for people who are responsible for cataloguing resources.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet industry requirements for cataloguing resources.

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Custom Content Section

Not applicable.

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BSBSS00071 Digitisation Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements for digitising information resources.

Pathways Information

Units from this skill set can contribute to credit towards BSB31215 Certificate III in Library and Information Services and BSB42115 Certificate IV in Library and Information Services.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBLIB506 Maintain digital repositories

ICPDMT321 Capture a digital image

ICPDMT322 Edit a digital image

ICPPRP322 Digitise images for reproduction

ICPPRP397 Transfer digital files

ICPPRP422 Digitise complex images for reproduction

Target Group

This skill set is for people who are responsible for digitising information resources.

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Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet industry requirements for digitising information resources.

Custom Content Section

Not applicable.

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BSBSS00072 Manage Collections Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements for managing small collections held in museums and galleries.

Pathways Information

Units from this skill set can contribute to credit towards BSB52115 Diploma of Library and Information Services.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBLIB301 Catalogue objects into collections

BSBLIB401 Record and maintain collection information

BSBLIB506 Maintain digital repositories

CUACNM601 Manage collection maintenance and preservation procedures

Target Group

This skill set is for people who are responsible for managing small collections held in museums and galleries.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements for managing small collections.

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Custom Content Section

Not applicable.

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BSBSS00073 Organise and Access Collections Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to organise and access small collections held in museums and galleries.

Pathways Information

Units from this skill set can contribute to credit towards BSB42115 Certificate IV in Library and Information Services and BSB52115 Diploma of Library and Information Services.

Licensing/Regulatory Information

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

Skill Set Requirements

CUACNM401 Assess the significance of collection objects

BSBLIB502 Manage the development of collections

CUAPRE401 Implement preventive conservation activities

Target Group

This skill set is for people who are responsible for organising and accessing small collections held in museums and galleries.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements for organising and accessing collections.

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Custom Content Section

Not applicable.

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BSBSS00074 Manage Association Finances and Risk Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to manage finances and to identify and manage risk within an association/club.

Pathways Information

Units from this skill set can contribute to credit towards BSB40915 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

BSBGOV504 Monitor organisational finances

BSBRSK401 Identify risk and apply risk management processes

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

Target Group

Club/Association Treasurer

Club/Association Committee/Board members

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to manage association/club finances.

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Custom Content Section

Not applicable.

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BSBSS00075 Coordinate Committee Activity Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to coordinate association/club committee activity, incorporating compliant organisational practices.

Pathways Information

Units from this skill set can contribute to credit towards BSB40915 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

- BSBGOV405 Undertake the roles and responsibilities of committee or board members
- BSBCOM406 Conduct work within a compliance framework
- BSBGOV501 Review and apply the organisation's constitution

Target Group

Club/Association Executive Officer/CEO/ President

Club/Association Committee/Board members

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to coordinate committee activity in an association/club.

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Custom Content Section

Not applicable.

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BSBSS00076 Conduct Community Liaison to Promote Association Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to liaise with the community to promote association practices and potentially attract members.

Pathways Information

Units from this skill set can contribute to credit towards BSB40915 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

BSBGOV404 Communicate with the community

BSBDIV301 Work effectively with diversity

BSBGOV502 Recruit and coordinate committee members

Target Group

Club/Association Executive Officer/CEO/ President

Club/Association Committee/Board members

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to conduct community liaison activity to promote association/club activity and objectives.

Custom Content Section

Not applicable.

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BSBSS00077 Marketing and Communication Foundations Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to work in the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB42415 Certificate IV in Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBCMM401 Make a presentation

BSBCRT401 Articulate, present and debate ideas

BSBMGT407 Apply digital solutions to work processes

BSBMKG417 Apply marketing communication across a convergent industry

BSBMKG418 Develop and apply knowledge of marketing communication industry

Target Group

Entrants into the marketing and communication industry.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to work in the marketing and communication industry.

Custom Content Section

Not applicable.

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BSBSS00078 Creative Communication Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to develop creative communication within the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADV509 Create mass print media advertisements

BSBADV510 Create mass electronic media advertisements

BSBCRT501 Originate and develop concepts

BSBMKG530 Create distributed multiplatform digital advertisements

BSBWRT501 Write persuasive copy

ICTGAM504 Manage interactive media production

Target Group

Managers.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to develop creative communication within the marketing and communication industry.

Custom Content Section

Not applicable.

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BSBSS00079 Digital Applications Skill Set

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to develop and design digital content in the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBEBU511 Development and implement an e-business strategy

BSBMKG528 Mine data to identify industry directions

BSBMKG534 Design effective digital user experiences

BSBMKG535 Devise a search engine optimisation strategy

BSBMKG536 Develop strategies to monetise digital engagement

BSBMKG537 Develop a social media engagement plan

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Target Group

Marketing Managers.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to develop and design digital content in marketing and communication industry.

Custom Content Section

Not applicable.

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BSBSS00080 Media Engagement Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to carry out media engagement in the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADV507 Develop a media plan

BSBMKG510 Plan e-marketing communications

BSBMKG529 Manage client account

Target Group

Marketing and Advertising Managers.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to carry out media engagement in the marketing and communication industry.

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Custom Content Section

Not applicable.

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BSBSS00081 Public Relations Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to work in public relations.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

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

Target Group

Public Relations Managers.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to work in public relations.

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Custom Content Section

Not applicable.

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BSBSS00082 Marketing Elements Skill Set

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Description

This skill set is for those who are seeking to enter the world of marketing and communication.

Pathways Information

Units from this skill set can contribute to credit towards BSB42415 Certificate IV in Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMKG401 Profile the market

BSBMKG408 Conduct market research

BSBMKG413 Promote products and services

BSBMKG419 Analyse consumer behaviour

BSBRES411 Analyse and present research information

Target Group

Entrants into the marketing and communication industry.

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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 people entering the world of marketing and communication.

Custom Content Section

Not applicable.

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BSBSS00083 Marketing Operations Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set is for staff seeking to enter marketing and communication operations.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

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

Target Group

Entrants into the marketing and communication industry.

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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 people in marketing and communication operations roles.

Custom Content Section

Not applicable.

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BSBSS00084 Strategic Marketing Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set is for staff seeking a senior marketing and communication role.

Pathways Information

Units from this skill set can contribute to credit towards BSB61315 Advanced Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMKG609 Develop a marketing plan

BSBFIM601 Manage finances

BSBMKG603 Manage the marketing processes

BSBMKG608 Develop organisational marketing objectives

BSBMKG611 Manage measurement of marketing effectiveness

Target Group

Senior level marketing and communication staff.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Package meet the industry requirements for people entering senior marketing and communication roles.

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Custom Content Section

Not applicable.

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BSBSS00085 Market Analysis Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to analyse market intelligence in the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBMKG501 Identify and evaluate marketing opportunities

BSBMKG502 Establish and adjust the marketing mix

BSBMKG507 Interpret market trends and developments

BSBMKG520 Manage compliance within the marketing legislative framework

BSBMKG528 Mine data to identify industry directions

Target Group

Managers.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to analyse market intelligence in the marketing and communication industry.

Custom Content Section

Not applicable.

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BSBSS00086 Campaign Management Skill Set

Modification History

Release	Comments
Release 1	This skill set first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements to manage campaigns in the marketing and communication industry.

Pathways Information

Units from this skill set can contribute to credit towards BSB52415 Diploma of Marketing and Communication.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBADV602 Develop an ad campaign

BSBADV603 Manage advertising production

BSBADV604 Execute an advertising campaign

BSBADV605 Evaluate campaign effectiveness

BSBMKG529 Manage client account

Target Group

Campaign Managers.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements to manage campaigns in the marketing and communication industry.

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Custom Content Section

Not applicable.

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BSBSS00087 Small Business Growth Skill Set

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Description

This skill set is for owners or managers of an established small or micro business who have a leadership role in growing the business.

Pathways Information

Units from this skill set can contribute to credit towards BSB42515 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

BSBSMB420 Evaluate and develop small business operations

BSBSMB421 Manage small business finances

BSBSMB422 Plan small business growth

BSBSMB423 Create a digital technology plan for small business

BSBWOR424 Develop a time management plan

Target Group

Managers and leaders.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements for operating and growing an established micro or small business.

Custom Content Section

Not applicable.

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BSBSS00088 Small Business Survival Skill Set

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Description

This skill set is for owners or managers of an established small or micro business who are responsible for decision-making that influences the operation of the business.

Pathways Information

Units from this skill set can contribute to credit towards BSB42515 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

BSBCUS501 Manage quality customer service

BSBSMB415 Refine and strengthen a small business

BSBSMB418 Manage compliance for small business

BSBSMB423 Create a digital technology plan for small business

Target Group

Managers and leaders.

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Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet the industry requirements for developing an established small business.

Custom Content Section

Not applicable.

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BSBSS00089 Workplace Innovation Skill Set

Modification History

Release	Comments
Release 2	This version first released with BSB Business Services Training Package Version 3.0. Version created to update codes and titles in unit list.
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Description

This skill set addresses the skills, knowledge and performance requirements for using collaborative processes in the workplace to develop innovative ideas.

Pathways Information

The units of competency could provide credit towards BSB30115 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

SIRXQUA001A Develop innovative ideas at work

BSBINN301 Promote innovation in a team environment

Target Group

Staff at all levels.

Suggested words for Statement of Attainment

These units of competency meet industry requirements for using collaborative processes in the workplace to develop innovative ideas.

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BSBSS00090 Auditing Skill Set

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 5.0.

Description

This skill set addresses the skills, knowledge and performance requirements for individuals who lead quality audits.

Pathways Information

The units of competency could provide credit towards BSB51615 Diploma of Quality Auditing.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBAUD402 Participate in a quality audit

BSBAUD501 Initiate a quality audit

BSBAUD503 Lead a quality audit

BSBAUD504 Report on a quality audit

Target Group

Quality Auditors.

Suggested words for Statement of Attainment

These units of competency meet industry requirements to lead quality audits.

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BSBSS00091 Capture and Present Big Data Skill Set

Modification History

Release	Comment
Release 1	This version first released with BSB Business Services Training Package Version 6.0.

Description

This skill set addresses the skills and knowledge to capture, analyse and present big data from one or more sources for a range of purposes in a broad range of workplaces and industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBXBD401 Capture and store big data

BSBXBD402 Test big data samples

BSBXBD403 Analyse big data

BSBXBD406 Present big data insights

Target Group

This skill set applies to those working in a broad range of industries who as part of their job are responsible for the operational use of big data.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to capture and present big data.

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BSBSS00092 Manage Big Data Skill Set

Modification History

Release	Comment
Release 1	This version first released with BSB Business Services Training Package Version 6.0.

Description

This skill set addresses the skills and knowledge to manage big data for a range of purposes in a broad range of workplaces and industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBXBD405 Develop procedures for managing big data

BSBXBD407 Protect big data integrity

BSBXBD408 Implement and review procedures for managing big data

Target Group

This skill set applies to those working in a broad range of industries who as part of their job are responsible for managing big data.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to manage big data.

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BSBSS00093 Cyber Security Threat Assessment and Risk Management Skill Set

Modification History

Release	Comment
Release 1	This version first released with BSB Business Services Training Package Version 6.0.

Description

This skill set addresses the skills and knowledge to engage with assessment of cyber threats to an organisation and the management of the identified threats, across a broad range of industries.

Pathways Information

The units provide credit towards qualifications in the Business Services Training Packages.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBXCS403 Contribute to cyber security threat assessments

BSBXCS404 Contribute to cyber security risk management

Target Group

This skill set applies to those working in a broad range of industries who as part of their job role contribute to cyber security threat assessments and cyber security risk management.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to contribute to cyber security threat assessments and risk management.

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BSBSS00094 Cyber Security Awareness Skill Set

Modification History

Release	Comment
Release 1	This version first released with BSB Business Services Training Package Version 6.0.

Description

This skill set addresses the skills and knowledge to assist an organisation improve cyber threat awareness and protect against cyber risk across a broad range of industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

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

Skill Set Requirements

BSBXCS301 Protect own personal online profile from cyber security threats

BSBXCS302 Identify and report online security threats.

BSBXCS303 Securely manage personally identifiable information and workplace information

BSBXCS402 Promote workplace cyber security awareness and practices

Target Group

This skill set applies to those working in a broad range of industries who as part of their job role engage in cyber security threat assessments and protection against cyber security risk.

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Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to assist in raising cyber security awareness with organisations.

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BSBSS00095 Cross-Sector Infection Control Skill Set

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 6.1.

Description

This skill set addresses the skills and knowledge required to undertake work activities in compliance with organisational procedures that prevent and control infection.

For information on delivery and associated job roles, please refer to the relevant Companion Volume Implementation Guide and RTO Guidance available on VETNet.

Pathways Information

Achievement of this unit of competency provides credit towards the Certificate III in Work Health and Safety, the Certificate III in Business and other qualifications that allow for selection of this unit of competency.

Licensing/Regulatory Information

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Skill Set Requirements

BSBWHS332X Apply infection prevention and control procedures to own work activities

Target Group

This skill set is for workers in all industries who require the skills and knowledge to reduce the risk and transmission of infection while carrying out routine work activities in their job role.

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Suggested words for Statement of Attainment

This unit of competency from the BSB Business Services Training Package provides the skills and knowledge required to follow infection prevention and control procedures in the workplace.

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