



**Australian Government**

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

# **FNSORG503A Develop a resource plan**

**Revision Number: 1**

## FNSORG503A Develop a resource plan

### Modification History

Not applicable.

### Unit Descriptor

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| <b>Unit descriptor</b> | <p>This unit describes the performance outcomes, skills and knowledge required to identify the critical factors for success of specific projects or periodic work requirements and plan for consequent priorities, budgets and workflow levels. Plans may apply to planning for:</p> <ul style="list-style-type: none"> <li>• peaks and troughs in workflow</li> <li>• resource shortages</li> <li>• specific projects</li> <li>• allocation of staff or resources during emergencies.</li> </ul> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p> |
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### Application of the Unit

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| <b>Application of the unit</b> | <p>This unit may apply to job roles in all sectors of the financial services or other industries where job roles involve resource planning.</p> |
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### Licensing/Regulatory Information

Not applicable.

### Pre-Requisites

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| <b>Prerequisite units</b> |  |
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| <b>Prerequisite units</b> |  |  |
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## Employability Skills Information

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| <b>Employability skills</b> | This unit contains employability skills. |
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## Elements and Performance Criteria Pre-Content

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| Elements describe the essential outcomes of a unit of competency. | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide. |
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## Elements and Performance Criteria

| ELEMENT   | PERFORMANCE CRITERIA   |
|---|--|
| 1. Identify critical success factors                                | 1.1. <b>Organisation objectives and legislative issues</b> which impact on the <i>project</i> in question are identified and prioritised<br>1.2. <b>Resources</b> required to meet objectives and <b>critical success factors</b> are identified and documented  |
| 2. Analyse existing resource and competency capacities              | 2.1. Current and valid <b>employee data</b> and resources are accessed, interpreted and appraised<br>2.2. <b>Competency</b> levels for personnel are ascertained and verified  |
| 3. Determine future resource requirements                           | 3.1. Available information on <b>workloads</b> is obtained and analysed to determine temporal and spatial patterns<br>3.2. <b>Internal and external factors</b> likely to impact on resources are taken into account and a profile of projected resource requirements developed<br>3.3. Competency levels required to meet future requirements and inconsistencies with current competency levels are identified |
| 4. Develop a plan to adapt existing capacities to meet future needs | 4.1. Training is undertaken to ensure adequate competency levels to meet future requirements<br>4.2. Strategies to meet resource shortages are incorporated into plan and resources prioritised<br>4.3. External consultants are engaged where appropriate   |
| 5. Review and evaluate plan   | 5.1. All stakeholders are consulted to determine appropriateness of plan<br>5.2. Modifications to the plan are agreed and incorporated as required   |

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

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

#### Required skills

- well-developed communication and interpersonal skills to:
  - negotiate and clarify resource planning requirements, using questioning and active listening as required
  - inform staff of planning purpose and implementation processes and deal with issues that arise, providing a constructive working relationship
  - share information, listen and understand
  - use language and concepts appropriate to cultural differences
- well-developed research and analysis skills for accessing, interpreting and managing complex information and developing forecasts of resources needs
- IT skills for accessing and using appropriate systems and databases
- well-developed literacy skills to:
  - read and interpret documentation from a variety of sources
  - prepare clear and accessible planning documentation
- problem solving skills to identify any issues that have the potential to impact on resource planning and utilisation and to develop options to resolve these issues when they arise
- organisational and time management skills to manage and train staff, sequence tasks, meet timelines and arrange meetings

#### Required knowledge

- industry development strategies
- management planning techniques and tools
- organisation policy and procedure
- relevant legislation and regulations, including:
  - occupational health and safety (OHS)
  - Equal Employment Opportunity (EEO)
  - anti-discrimination
  - WorkCover or equivalent legislation
- techniques for evaluating competency of personnel

## Evidence Guide

| <b>EVIDENCE GUIDE</b>   |   |
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| <p>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.</p> |   |
| <b>Overview of assessment</b>   |   |
| <b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>   | <p>Evidence of the ability to:</p> <ul style="list-style-type: none"> <li>• locate and analyse comprehensive data on organisational resources</li> <li>• evaluate staff competencies</li> <li>• develop, negotiate and implement effective resourcing plans.</li> </ul>   |
| <b>Context of and specific resources for assessment</b>   | <p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>• competency is demonstrated in the context of the financial services work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment</li> <li>• access to and the use of a range of common office equipment, technology, software and consumables</li> <li>• access to organisational information systems and data.</li> </ul>   |
| <b>Method of assessment</b>   | <p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>• evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency</li> <li>• observing processes and procedures in workplaces</li> <li>• verbal or written questioning on underpinning knowledge and skills</li> <li>• setting and reviewing business simulations or scenarios</li> <li>• evaluating samples of work</li> <li>• accessing and validating third party reports.</li> </ul> |
| <b>Guidance information for assessment</b>  |   |

## 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.

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| <p><b><i>Organisation objectives and legislative issues</i></b> may include:</p> | <ul style="list-style-type: none"> <li>• budgets</li> <li>• client service</li> <li>• equal opportunities</li> <li>• human resource management</li> <li>• industry codes of practice</li> <li>• marketing</li> <li>• operational plans</li> <li>• Privacy Act</li> <li>• OHS Acts</li> <li>• Trade Practices Act.</li> </ul> |
| <p><b><i>Project</i></b> may include, but is not limited to:</p>                 | <ul style="list-style-type: none"> <li>• specific business projects such as:             <ul style="list-style-type: none"> <li>• audits</li> <li>• reviews</li> <li>• functions</li> <li>• periods of time such as holiday or rush periods.</li> </ul> </li> </ul>  |
| <p><b><i>Resources</i></b> may include:</p>                                      | <ul style="list-style-type: none"> <li>• budget</li> <li>• IT equipment</li> <li>• employees</li> <li>• materials</li> <li>• skills and expertise</li> <li>• support facilities</li> <li>• training.</li> </ul>  |
| <p><b><i>Critical success factors</i></b> may include:</p>                       | <ul style="list-style-type: none"> <li>• adaptability</li> <li>• cash flow</li> <li>• consumer demand</li> <li>• cross-channel staff cooperation</li> <li>• customer analysis</li> <li>• customer contact</li> <li>• risk analysis and management</li> <li>• staffing levels</li> <li>• timing of service.</li> </ul>        |
| <p><b><i>Employee data</i></b> may</p>   | <ul style="list-style-type: none"> <li>• competencies held/used</li> </ul>   |

| <b>RANGE STATEMENT</b>                        |  |
|---|--|
| include:                                      | <ul style="list-style-type: none"> <li>• payroll data</li> <li>• staff levels.</li> </ul>  |
| <i>Competencies</i> may relate to:            | <ul style="list-style-type: none"> <li>• management issues</li> <li>• product development</li> <li>• response times</li> <li>• service levels.</li> </ul>  |
| <i>Workload</i> documentation may include:    | <ul style="list-style-type: none"> <li>• customer requirement data</li> <li>• staff absenteeism data</li> <li>• staff availability data</li> <li>• staff interviews and questionnaires</li> <li>• trends in existing workloads.</li> </ul> |
| <b>Internal and external factors</b> include: | <ul style="list-style-type: none"> <li>• budgeting restrictions</li> <li>• external economic conditions</li> <li>• industry growth or decline</li> <li>• temporal factors such as holiday periods.</li> </ul>                              |

### Unit Sector(s)

|                    |                       |
|--------------------|-----------------------|
| <b>Unit sector</b> | Organisational skills |
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### Competency field

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| <b>Competency field</b> |  |
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### Co-requisite units

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| <b>Co-requisite units</b> |  |  |
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