



Australian Government

Department of Education, Employment and Workplace Relations

HLTAHW523B Manage budgets

Release: 1

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Modification History

Not Applicable

Unit Descriptor

Unit Descriptor

This unit describes the competencies required to manage the day-to-day responsibilities of administering program, work unit or cost centre budgets

Application of the Unit

Application

This unit is intended to address skills and knowledge required by those who manage budgets, such as project or program budgets relating to delivery of health care for Aboriginal and/or Torres Strait Islander communities

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills

This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in *italics* are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

1. Prepare *budget*

- 1.1 Identify and document workplace resource needs in accordance with workplace action plans
- 1.2 Cost and record funding needs
- 1.3 Prepare budget document and present to supervisor (or other relevant authority) for endorsement

2. Monitor budget expenditure

- 2.1 Maintain *systems for monitoring finances*
- 2.2 Ensure money is expended according to the endorsed budget document
- 2.3 Identify changing priorities and discuss with supervisor (or other relevant authority)
- 2.4 Amend budget document in response to changing priorities
- 2.5 Satisfy accountability requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

This includes knowledge of:

- Organisation guidelines relating to funding applications, budget compilation and expenditure
- Organisation procedures for cost centre management
- Accounting procedures as required by responsibilities and the workplace

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Prepare, document and present budget information in line with organisation requirements
- Monitor expenditure and review budgetary provisions in line with identified priorities and accountability requirements

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

This includes the ability to:

- Prepare budgets as part of submission writing
- Network, consult, negotiate and lobby in relation to budgets and funding
- Resolve conflict
- Manage financial aspects in line with requirements of own role

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects of assessment:

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- Consistency of performance should be demonstrated over the required range of situations relevant to the workplace
- Where, for reasons of safety, space, or access to equipment and resources, assessment takes place away from the workplace, the assessment environment should represent workplace conditions as closely as possible

Conditions of assessment:

This unit includes skills and knowledge specific to Aboriginal and/or Torres Strait Islander culture

Assessment must therefore be undertaken by a workplace assessor who has expertise in the unit of competency or who has the current qualification being assessed and who is:

- Aboriginal or Torres Strait Islander him/herself

or:

- accompanied and advised by an Aboriginal or Torres Strait Islander person who is a recognised member of the community with experience in primary health care

Context of assessment:

Competence should be demonstrated working individually, under supervision or as part of a primary health care team working with Aboriginal and/or Torres Strait Islander clients.

Assessment should replicate workplace conditions as far as possible.

EVIDENCE GUIDE

Related units:

This unit may be assessed independently or in conjunction with other units with associated workplace application.

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Cultural respect

This competency standard supports the recognition, protection and continued advancement of the inherent rights, cultures and traditions of Aboriginal and Torres Strait Islander peoples

It recognises that the improvement of the health status of Aboriginal and Torres Strait Islander people must include attention to physical, spiritual, cultural, emotional and social well being, community capacity and governance

Its application must be culturally sensitive and supportive of traditional healing and health, knowledge and practices

Community control

Community participation and control in decision-making is essential to all aspects of health work, and the role of the health worker is to support the community in this process

RANGE STATEMENT

Supervision

Supervision must be conducted in accordance with prevailing state/territory and organisation legislative and regulatory requirements

References to supervision may include either direct or indirect supervision of work by more experienced workers, supervisors, managers or other health professionals

A person at this level should **only** be required to make decisions about clients within the organisation's standard treatment protocols and associated guidelines

Legislative requirements

Federal, state or territory legislation may impact on workers' practices and responsibilities. Implementation of the competency standards should reflect the legislative framework in which a health worker operates. It is recognised that this may sometimes reduce the application of the Range of Variables in practice. However, assessment in the workplace or through simulation should address all essential skills and knowledge across the Range of Variables

Aboriginal and/or Torres Strait Islander Health Workers may be required to operate in situations that do not constitute "usual practice" due to lack of resources, remote locations and community needs. As a result, they may need to possess more competencies than described by "usual practice circumstances"

Under all circumstances, the employer must enable the worker to function within the prevailing legislative framework

Budget may relate to:

- Full year
- Length of project
- Quarter, or another period of time as required

Workplace resource needs include:

- Human
- Financial
- Physical (equipment) resources

RANGE STATEMENT

Systems for monitoring finances may include (for example):

- Account books
- Receipts and invoices
- Quotes, when required
- Bank accounts
- Audited statements, as required.

Unit Sector(s)

Not Applicable