



Australian Government

Department of Education, Employment and Workplace Relations

LGADMIN525A Undertake business planning

Release 2

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Modification History

LGADMIN525A Release 2: Layout adjusted.

LGADMIN525A Release 1: Primary release.

Unit Descriptor

This unit covers undertaking business planning for a unit or functional area within the organization. The unit specifically looks at research tools that underpin business planning, including the use of statistics. It covers identifying priorities, using different types of planning strategies, identifying environmental sustainability issues, managing growth and incorporating triple bottom line.

Application of the Unit

This unit supports the attainment of skills and knowledge required for competent workplace performance in councils of all sizes. Knowledge of the legislation and regulations within which councils must operate is essential. The unique nature of councils, as a tier of government directed by elected members and reflecting the needs of local communities, must be appropriately reflected.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a Unit of Competency

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Undertake research on business planning	1.1 Types of representations of <i>statistical data</i> are identified and analysed for appropriateness of purpose against organisational needs. 1.2 Trends and patterns from statistical data are identified and analysed to inform business planning. 1.3 Interpreted data is used to identify issues for consideration in business planning. 1.4 A range of planning strategies are identified and analysed for appropriateness to the unit and/or organisation.
2. Determine scope of required planning	2.1 Research is undertaken to identify issues relevant to the unit, including sustainability issues. 2.2 <i>Opportunities</i> for growth are investigated and identified. 2.3 Factors relevant to the organisation's vision and strategic plan are considered. 2.4 Analysis of all issues is undertaken and priorities are determined. 2.5 Risk management strategies are identified as part of the planning process. 2.6 A range of planning strategies are investigated and analysed to determine appropriate strategy to adopt.
3. Develop a business plan	3.1 Organisation vision, mission and purpose are confirmed and in line with identified business growth opportunity. 3.2 Appropriate research is undertaken to ensure all relevant issues are considered, including environment, finance, safety and other areas of impact and opportunity. 3.3 The <i>business plan</i> demonstrates analysis of community needs, resources and legal requirements in accordance with organisational goals. 3.4 Triple bottom line reporting issues are identified and considered in the development of business plan.
4. Develop operational strategies to meet identified business planning and potential growth	4.1 Performance measures, operational targets and quality assurance issues are developed to conform to business plan. 4.2 Structured approach to innovation, including the use of existing or emerging technologies, is developed to respond to changing community and unit or area requirements. 4.3 Key performance indicators and targets are identified and used to monitor client satisfaction and unit or area performance. 4.4 Business plan is clearly communicated and promoted to <i>relevant stakeholders</i> and staff to ensure understanding and support. 4.5 Appropriate structures are designed, redesigned and implemented to optimise achievement of unit or area goals

ELEMENT**PERFORMANCE CRITERIA**

and stakeholder expectations.
4.6 Processes are developed to ensure that ongoing evaluation of the planning process is conducted.

Required Skills and Knowledge

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

Required Skills

- communication
- consultation
- conflict management
- analytical
- problem solving
- research
- evaluative
- ability to collate and interpret statistical data, including trend analysis
- risk management
- cost-benefit analysis
- strategic thinking
- negotiation

Required Knowledge

- strategic planning principles and approaches
- organisational development and management
- quality assurance
- data collection methodologies
- statistical interpretation and analysis
- relevant legislation that affects business operation
- purpose, mission and values of the organisation
- external environment, including social, political, economic and technological developments
- concept of sustained competitive advantage
- consultative processes and methods
- organisational change processes
- organisational design processes
- legislation, codes and by-laws relevant to the organisation's operations
- business planning concepts
- environment sustainability as a whole system approach
- environmental issues

Evidence Guide

Overview of assessment requirements

A person who demonstrates competency in this unit will be able to perform the outcomes described in the Elements to the required performance level detailed in the Performance Criteria. The knowledge and skill requirements described in the Range Statement must also be demonstrated. For example, knowledge of the legislative framework and safe work practices that underpin the performance of the unit are also required to be demonstrated.

Critical aspects of evidence to be considered

The demonstrated ability to:

- undertake appropriate, detailed and thorough research using a range of techniques to evaluate the organisation's own capabilities and the environment in which the organisation and unit or area is operating
- develop or restate the organisation's strategic direction in a clear and unequivocal manner based on the analysis undertaken
- contribute to the development of business plans that minimise environmental impacts and maximise opportunities within the organisation, unit or area
- manage and promote the business plan within the organisation, unit or area

Context of assessment

Competency is demonstrated by performance of all stated criteria, with particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope of the Range Statement.

Assessment must take account of the endorsed Assessment Guidelines in the Local Government Training Package.

Assessment of the performance requirements in this unit should be undertaken in an actual workplace or simulated environment.

Assessment should reinforce the integration of the key competencies for the particular AQF level. Refer to the key competency levels at the end of this unit.

Relationship to other units(prerequisite or co-requisite units)

To enable holistic assessment this unit may be assessed with other units that form part of the job role.

Method of assessment

The following assessment methods are suggested:

- observation of the learner performing a range of workplace tasks over sufficient time to demonstrate handling of a range of contingencies
- written and/or oral questioning to assess knowledge and

	<p>understanding</p> <ul style="list-style-type: none">• completion of workplace documentation• third-party reports from experienced practitioners• completion of self-paced learning materials including personal reflection and feedback from trainer, coach or supervisor
Evidence required for demonstration of consistent performance	Evidence should be collected over a set period of time that is sufficient to include dealings with an appropriate range and variety of situations.
Resource implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace.

Range Statement

The Range Statement relates to the Unit of Competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the Performance Criteria is detailed below.

<i>Relevant stakeholders</i> may include:	<ul style="list-style-type: none"> • clients • employees • government and government agencies • suppliers of resources • community • management • funding bodies
<i>Ecologically sustainable development issues</i> may include:	<ul style="list-style-type: none"> • waste minimisation and recycling • emissions and spills • resource efficiency including water and energy • alternative energy sources • reduction in use of non-renewable resources
<i>Opportunities</i> may include:	<ul style="list-style-type: none"> • corporate image and corporate citizenship • staff morale • cost reduction • identification of market potential • product differentiation and branding
<i>Business plan</i> may include:	<ul style="list-style-type: none"> • mission, goals and objectives • strategies for achieving goals • work plans • income and expenditure statement • cash flow forecast • quality assurance mechanisms • performance measures
<i>Information</i> may include:	<ul style="list-style-type: none"> • research into the environment • research into client needs • resource requirements • interests of key stakeholders • business viability
<i>Statistical data</i> may include:	<ul style="list-style-type: none"> • current financial state of the organisation • current financial state of the unit or area • financial performance to date • review of financial inputs required, including sources of funding and finance • projections of likely financial results • budgeting • risks and measures to manage or minimise risks

- forms of finance including working capital, fixed capital, debt and equity capital

Unit Sector(s)

Administration