



Australian Government

**Department of Education,
Science and Training**



PRD01 Property Development and Management Training Package

Volume 1 of 5

Version Number: 5
Review Date: 31 December 2005

ISC INDUSTRY
SKILLS
COUNCILS
Creating Australia's Future

PRD01 Property Development and Management Training Package

The material contained within this document refers only to the endorsed components of PRD01 Property Development and Management Training Package for the Real Estate and Stock & Station Agency Sectors.

This volume is not to be used in isolation, but must be used in the context of the whole endorsed Training Package.

Volume 1 of 5

Separate documents exist that cover the endorsed components of PRD01 Property Development and Management Training Package for each of the following:

- Spatial Information Services Sector
- Business Broking Sector
- Property Operations and Development Sector
- Access Consulting Sector

This Training Package is to be reviewed by 31 December 2005.

PRD01 Property Development and Management Training Package

©Commonwealth of Australia, 2001

This work has been produced with the assistance of funding provided by the Commonwealth Government through the Department of Education, Science and Training (DEST).

An individual may make a photocopy of all or part of the work for their personal use.

A Registered Training Organisation may make photocopies of all or part of the work for the teaching purposes of that organisation, including for supply to its students provided that any consideration does not exceed the marginal cost of preparation, reproduction, assembly and delivery.

Except as permitted under the Copyright Act 1968, all other rights are reserved. Requests for permission may be directed to:

Branch Manager,
Technology and Information Services Branch,
Industry Skills Development Group,
Department of Education, Science and Training,
GPO Box 9880 Canberra City, ACT, 2601.
Website: www.dest.gov.au

This work is the result of wide consultations with Australian industry participants. It is a collaborative view and does not necessarily represent the view of DEST or any specific body. For the sake of brevity it may omit factors which could be pertinent in particular cases.

While care has been taken in the preparation of this Training Package, DEST and the original developer do not warrant that any licensing or registration requirements specified here are either complete or up-to-date for your State or Territory. DEST and the original developer do not accept any liability for any damage or loss (including indirect and consequential loss) incurred by any person as a result of relying on the information contained in this Training Package.

This Training Package should not be regarded as professional advice and it should not be relied upon in any important matter without obtaining appropriate advice relevant to your circumstances.

Published by:

Australian Training Products Ltd
Level 25, 150 Lonsdale Street
Melbourne
VIC 3000

Phone: +61 3 9655 0600

Fax: +61 3 9639 4684

First published: 1 June 2001

ISBN: 0 642 80381 1

Printed by:

Mercury Printeam

AEShareNet Code: P

Print Version No: 5

Release Date: 8/08/2005

TABLE OF CONTENTS

| | |
|--|-----------|
| Preliminary Information..... | 7 |
| Important Note to Users..... | 7 |
| Summary of AQF qualifications in this Training Package..... | 9 |
| Units of competency in this Training Package and their prerequisites'..... | 10 |
| Imported units of competency in this Training Package..... | 19 |
| Overview..... | 24 |
| What is a Training Package?..... | 24 |
| Training Package Endorsed Components..... | 25 |
| Training Package, Qualification and Unit of Competency Codes..... | 26 |
| Training Package, Qualification and Unit of Competency Titles..... | 27 |
| Overview of Training Packages in the Property Services Industry..... | 28 |
| Introduction..... | 30 |
| Information on the Real Estate and Stock and Station Agency Sectors of the Property Development and Management Training Package..... | 30 |
| Scope and Development of the Training Package-Real Estate Sector..... | 30 |
| Key competencies in the standards..... | 33 |
| Qualifications Framework..... | 34 |
| The Australian Qualifications Framework..... | 34 |
| Qualifications..... | 43 |
| Units Which May be Accessed as Part of the Stock and Station Agency Qualifications | 43 |
| Packaging Advice | 43 |
| Core and Elective Units | 43 |
| Units Packaged at More Than One Level | 44 |
| New Apprenticeship Qualifications | 45 |
| Selection of Units (Career Planning) | 45 |
| PRD30101 Certificate III in Property (Real Estate)..... | 46 |
| PRD30201 Certificate III in Property (Livestock Services)..... | 47 |
| PRD30301 Certificate III in Spatial Information Services..... | 48 |
| PRD30504 Certificate III in Property (Operations)..... | 49 |
| PRD40101 Certificate IV in Property (Real Estate)..... | 50 |
| PRD40201 Certificate IV in Property (Stock and Station Agency)..... | 52 |
| PRD40403 Certificate IV in Property (Business Broking)..... | 53 |
| PRD40504 Certificate IV in Property (Operations)..... | 55 |
| PRD40605 Certificate IV in Property (Access Consulting)..... | 57 |
| PRD50101 Diploma of Property (Real Estate)..... | 60 |
| PRD50201 Diploma of Property (Stock and Station Agency)..... | 61 |
| PRD50301 Diploma of Spatial Information Services..... | 62 |
| PRD50403 Diploma of Property (Business Broking)..... | 63 |
| PRD50504 Diploma of Property, Asset and Facility Management..... | 65 |
| PRD50605 Diploma of Property (Access Consulting)..... | 67 |
| PRD60301 Advanced Diploma of Spatial Information Services..... | 70 |
| PRD60504 Advanced Diploma of Property, Asset and Facility Management..... | 71 |
| Assessment Guidelines..... | 73 |
| Introduction..... | 73 |
| Assessment System Overview..... | 73 |
| Australian Quality Training Framework Assessment Requirement..... | 73 |
| Licensing/registration requirements..... | 74 |
| Pathways..... | 77 |
| Designing Assessment Tools..... | 79 |
| Use of Assessment Tools..... | 79 |
| Using Prepared Assessment Tools..... | 79 |
| Developing Assessment Tools..... | 79 |
| Conducting Assessment..... | 80 |
| Access and Equity..... | 81 |
| Futher Sources of Information..... | 82 |
| General Resources..... | 82 |
| Assessment Resources..... | 82 |

Table of Contents

| | |
|--|-----------|
| Assessment Tool Design and Conducting Assessment..... | 83 |
| Assessor Training..... | 83 |
| Assessment System Design and Management..... | 83 |
| Competency Standards..... | 84 |
| What is Competency..... | 84 |
| Contextualisation of Units of Competency by RTOs..... | 84 |
| Components of Units of Competency..... | 84 |
| Key Competencies..... | 86 |
| Performance Levels..... | 87 |
| Qualification Customisation Within and Outside the Training Package..... | 88 |
| Units | |
| PRDPOD62A Clarify and confirm property information requirements..... | 90 |
| PRDRE01A Develop a strategic business plan..... | 93 |
| PRDRE02A Manage agency performance..... | 97 |
| PRDRE03A Develop and implement client service strategies..... | 101 |
| PRDRE04A Manage and monitor effective client service..... | 104 |
| PRDRE05A Market agency..... | 107 |
| PRDRE06A Manage human resources..... | 111 |
| PRDRE07A Implement staff skill development and training..... | 116 |
| PRDRE08A Manage efficient financial systems..... | 120 |
| PRDRE09A Implement and monitor financial management systems..... | 124 |
| PRDRE10A Manage agency risk..... | 128 |
| PRDRE11A Provide property appraisal..... | 132 |
| PRDRE12A Establish and expand client base..... | 136 |
| PRDRE13A Obtain property listings..... | 140 |
| PRDRE14A Market property..... | 144 |
| PRDRE15A Undertake property sale by private treaty..... | 148 |
| PRDRE16A Monitor sales process..... | 152 |
| PRDRE17A Effectively manage property and account to landlord..... | 155 |
| PRDRE18A Lease property..... | 158 |
| PRDRE19A Provide property management services..... | 161 |
| PRDRE20A Provide strata management services..... | 165 |
| PRDRE21A Provide property development and marketing services..... | 169 |
| PRDRE22A Present and explain property reports..... | 173 |
| PRDRE23A Maintain agency:client relationship..... | 176 |
| PRDRE24A Prepare asset refurbishment plan..... | 179 |
| PRDRE25A Respond to property enquiry..... | 183 |
| PRDRE26A Conduct property sale by auction..... | 186 |
| PRDRE27A Monitor chattel auction/clearing sale..... | 189 |
| PRDRE28A Maintain trust account..... | 192 |
| PRDRE29A Use and maintain a property information database..... | 195 |
| PRDRE30A Implement personal marketing plan..... | 198 |
| PRDRE31A Negotiate effectively with landlords and tenants..... | 201 |
| PRDRE32A Maintain and protect conditions of rented properties..... | 203 |
| PRDRE33A Coordinate property inspection..... | 207 |
| PRDRE34A Maintain key register..... | 209 |
| PRDRE35A Communicate effectively and accurately with clients..... | 211 |
| PRDRE36A Process marketing material..... | 214 |
| PRDRE37A Perform and record property management activities and transactions..... | 216 |
| PRDRE38A Maintain equipment and facilities..... | 219 |
| PRDRE39A Prepare and execute documentation..... | 222 |
| PRDSSA11A Administer agency activities..... | 228 |
| PRDSSA17A Establish and expand client base..... | 232 |
| PRDSSA18A Apply market knowledge to service business opportunities..... | 235 |
| PRDSSA19A Respond to enquiry..... | 238 |
| PRDSSA20A List properties for sale..... | 241 |
| PRDSSA21A Market property for sale..... | 245 |
| PRDSSA22A Negotiate sale by private treaty..... | 248 |
| PRDSSA23A Conduct auction sale..... | 252 |
| PRDSSA24A Conduct chattel auction/clearing sale..... | 256 |
| PRDSSA25A Conduct a sale by tender..... | 260 |
| PRDSSA26A Administer process to completion or abandonment of sale..... | 263 |
| PRDSSA27A Lease rural property..... | 267 |
| PRDSSA28A Manage properties for clients..... | 271 |

Table of Contents

| | |
|---|-----|
| PRDSSA29A Advise client on sale and purchase alternatives..... | 275 |
| PRDSSA30A Select stock for sale..... | 278 |
| PRDSSA31A Prepare stock for sale..... | 282 |
| PRDSSA32A Conduct livestock sale by auction..... | 285 |
| PRDSSA33A Arrange buyer and inspections..... | 288 |
| PRDSSA34A Provide information on alternative use of assets..... | 291 |
| BSAFIN301B Maintain daily financial records for accounting purposes..... | 294 |
| BSAFIN302B Monitor cash control for accounting purposes..... | 300 |
| BSAFIN501B Manage payroll records for employee salaries and statutory record-keeping purposes..... | 306 |
| BSAFIN502B Monitor and control disbursements within a given budget..... | 312 |
| BSAINF401B Supervise an established records system to ensure its integrity..... | 316 |
| BSAORG301B Coordinate own work schedule with that of others to achieve agreed team/section goals..... | 324 |
| BSAORG402B Plan meetings to enable the stated objectives of the meetings to be met..... | 328 |
| BSAORG501B Manage meetings to achieve identified team/section goals..... | 334 |
| BSATEC301B Use the advanced functions of a range of office equipment to complete daily tasks..... | 339 |
| BSATEC302B Design and develop documents, reports and worksheets..... | 343 |
| BSATEC303B Maintain computer files..... | 347 |
| BSXFMI404A Participate in, lead and facilitate work teams..... | 350 |
| BSXFMI504A Participate, lead in and facilitate work teams..... | 354 |
| BSXFMI511A Contribute to the development of a workplace learning environment..... | 357 |
| PRMPM31A Process accounts receivable and payable..... | 360 |
| PRMPM32A Maintain a cash receipting system..... | 363 |
| PRMPM35A Maintain asset management records and control..... | 365 |
| PRASAS15A Plan and schedule routine maintenance, repairs and modifications..... | 367 |

Preliminary Information

Important Note to Users

Training Packages are not static documents; they are amended periodically to reflect the latest industry practices and are version controlled. It is essential that the latest version is always used.

Check the version number before commencing training or assessment

This Training Package is Version 5 - check whether this is the latest version by going to the National Training Information Service (www.ntis.gov.au) and locating information about the Training Package. Alternatively, contact Construction and Property Services Industry Skills Council at <http://www.cpsisc.com.au> to confirm the latest version number.

Explanation of version number conventions

The primary release Training Package is Version 1. When changes are made to a Training Package, sometimes the version number is changed and sometimes it is not, depending on the extent of the change. When a Training Package is reviewed it is considered to be a new Training Package for the purposes of version control, and is Version 1. Do not confuse the version number with the Training Package's national code (which remains the same during its period of endorsement).

Version modification history

The version details of this endorsed Training Package are in the table below. The latest information is at the top of the table.

| Version | Release Date | Comments |
|---------|--------------|--|
| 5 | 8/08/2005 | The review date for this Training Package has now been extended to 31 December 2005. |
| 5 | 20/06/2005 | Addition of Access Consulting sector units of competency and two additional qualifications: PRD40605 Certificate IV in Property (Access Consulting) and PRD50605 Diploma of Property (Access Consulting) |
| 4 | 8/06/2004 | Addition of Property Operations and Development Sector competency standards and four additional qualifications PRD30504 Certificate III in Property (Operations), PRD40504 Certificate IV in Property (Operations), PRD50504 Diploma of Property, Asset and Facilities Management and PRD60504 Advanced Diploma of Property, Asset and Facilities Management |
| 3 | 23/09/2003 | Addition of Business Broking Sector standards and two additional qualifications PRD40403 Certificate IV in Property (Business Broking) and PRD50403 Diploma of Property (Business Broking) |
| 2 | 11/12/2002 | Release of Spatial Information Services Sector |
| 1 | 1/06/2001 | Primary release including Real Estate and Stock and Station Sectors |

Forms control: All endorsed training packages will have a version number displayed on the imprint

page of every volume constituting that training package. Every training package will display an up-to-date copy of this modification history form, to be placed immediately after the contents page of the first volume of the training package. Comments on changes will only show sufficient detail to enable a user to identify the nature and location of the change. Changes to training packages will generally be batched at quarterly intervals. This modification history form will be included within any displayed sample of that training package and will constitute all detail available to identify changes.

Summary of AQF qualifications in this Training Package

| Code | Title |
|----------|---|
| PRD30101 | Certificate III in Property (Real Estate) |
| PRD30201 | Certificate III in Property (Livestock Services) |
| PRD30301 | Certificate III in Spatial Information Services |
| PRD30504 | Certificate III in Property (Operations) |
| PRD40101 | Certificate IV in Property (Real Estate) |
| PRD40201 | Certificate IV in Property (Stock and Station Agency) |
| PRD40403 | Certificate IV in Property (Business Broking) |
| PRD40504 | Certificate IV in Property (Operations) |
| PRD40605 | Certificate IV in Property (Access Consulting) |
| PRD50101 | Diploma of Property (Real Estate) |
| PRD50201 | Diploma of Property (Stock and Station Agency) |
| PRD50301 | Diploma of Spatial Information Services |
| PRD50403 | Diploma of Property (Business Broking) |
| PRD50504 | Diploma of Property, Asset and Facility Management |
| PRD50605 | Diploma of Property (Access Consulting) |
| PRD60301 | Advanced Diploma of Spatial Information Services |
| PRD60504 | Advanced Diploma of Property, Asset and Facility Management |

Units of competency in this Training Package and their prerequisites'

Note – the pre-requisite column is only displayed if pre-requisites exist.

| Code | Title |
|-----------|---|
| PRDAC401A | Apply disability awareness to assessing access situations |
| PRDAC402A | Apply building control legislation to assess small-scale buildings for access |
| PRDAC403A | Assess construction plans |
| PRDAC404A | Communicate effectively as an access consultant |
| PRDAC405A | Conduct a building access audit |
| PRDAC406A | Conduct a playground access audit |
| PRDAC407A | Conduct a streetscape access audit |
| PRDAC408A | Conduct a transport conveyance and boarding device access audit |
| PRDAC409A | Conduct a transport premises access audit |
| PRDAC410A | Conduct an aged care facility access audit |
| PRDAC411A | Conduct an educational facility access audit |
| PRDAC412A | Conduct an outdoor recreation area access audit |
| PRDAC413A | Contribute effectively to building development teams |
| PRDAC414A | Contribute to policy development |
| PRDAC415A | Contribute to team effectiveness |
| PRDAC416A | Facilitate the development of Disability Discrimination Act Action Plans |
| PRDAC417A | Follow site occupational health and safety requirements |
| PRDAC418A | Manage risk |
| PRDAC419A | Prepare access reports |
| PRDAC420A | Prepare, deliver and evaluate public education sessions |
| PRDAC421A | Provide access advice on building fitout |
| PRDAC422A | Provide access advice on building renovations |
| PRDAC423A | Provide access advice on the provision of services |
| PRDAC424A | Research and analyse information on the provision of access |
| PRDAC425A | Work effectively as an access consultant |

| Code | Title |
|-------------|--|
| PRDAC501A | Assess documentation of building work for access and conduct inspections during the building process |
| PRDAC502A | Apply anthropometric principles to accessible building design and fitout |
| PRDAC503A | Apply building codes and standards to accessible large-scale buildings |
| PRDAC504A | Apply building control legislation to assessing large-scale buildings for access |
| PRDAC505A | Apply ergonomic principles to accessible building design and fitout |
| PRDAC506A | Apply mechanics of human body functions to accessible building design and fitout |
| PRDAC507A | Assess the construction of existing buildings and new building work required to be accessible |
| PRDAC508A | Coordinate policy development |
| PRDAC509A | Develop and evaluate public education programs |
| PRDAC510A | Evaluate materials for the construction of buildings for access |
| PRDAC511A | Provide access advice on the design of the built environment |
| PRDAC512A | Prepare a concept design for accessible building work |
| PRDAC513A | Prepare a design brief for accessible building work |
| PRDAC514A | Prepare and administer tender documentation for accessible building work |
| PRDAC515A | Prepare contract documentation for accessible building work |
| PRDAC516A | Prepare specification documentation for accessible building work |
| PRDAC517A | Provide expert access advice on renovations to private dwellings |
| PRDAC518A | Provide expert access advice on building renovations |
| PRDAC519A | Provide expert access advice to a complainant or respondent |
| PRDAC520A | Undertake research on access issues |
| PRDAC601A | Participate as an access expert on an Access Panel |

| Code | Title |
|-------------|--|
| PRDAC602A | Apply performance-based codes and risk management principles to assessing buildings for access |
| PRDAC603A | Apply unjustifiable hardship principles to Alternative Building Solutions for access |
| PRDBB01A | Work effectively in the business broking sector |
| PRDBB02A | Obtain prospects for listing |
| PRDBB03A | Appraise business |
| PRDBB04A | List business for sale |
| PRDBB05A | Promote and market listed business |
| PRDBB06A | Negotiate and execute sales |
| PRDBB07A | Value a business |
| PRDBB08A | Merge and/or acquire a business |
| PRDBB09A | Manage agency risk |
| PRDPOD301A | Work effectively in the property industry |
| PRDPOD302A | Meet customer needs and expectations |
| PRDPOD303A | Maintain workplace safety |
| PRDPOD304A | Identify risks and opportunities |
| PRDPOD305A | Monitor building facilities |
| PRDPOD306A | Collect and process property information |
| PRDPOD307A | Undertake property inspection |
| PRDPOD308A | Work effectively in the strata/community management sector |
| PRDPOD401A | Monitor a safe workplace |
| PRDPOD402A | Plan and coordinate property and facility inspection |
| PRDPOD403A | Analyse resource use in building operations |
| PRDPOD404A | Analyse risks and opportunities |
| PRDPOD405A | Implement customer service strategies |
| PRDPOD406A | Coordinate maintenance and repair of properties and facilities |
| PRDPOD407A | Analyse property and facility information |
| PRDPOD408A | Provide leadership in the property industry |

| Code | Title |
|-------------|---|
| PRDPOD409A | Participate in contract development and establishment |
| PRDPOD410A | Implement and monitor procurement process |
| PRDPOD411A | Contribute to the development of a tenancy mix strategy |
| PRDPOD412A | Participate in research of property investment |
| PRDPOD413A | Contribute to lifecycle maintenance strategy |
| PRDPOD414A | Facilitate meetings |
| PRDPOD415A | Arrange the lease of space |
| PRDPOD416A | Monitor space use |
| PRDPOD417A | Monitor service requirements |
| PRDPOD418A | Advise on performance of asset |
| PRDPOD419A | Occupy space |
| PRDPOD420A | Coordinate fit-out of property and facilities |
| PRDPOD421A | Coordinate construction contracts |
| PRDPOD422A | Maintain asset management system |
| PRDPOD423A | Arrange valuation of facilities and assets |
| PRDPOD424A | Promote process improvement |
| PRDPOD425A | Select and appoint contractors |
| PRDPOD426A | Manage conflict and disputes |
| PRDPOD427A | Assess and implement strata /community management agreement |
| PRDPOD501A | Coordinate risk management system |
| PRDPOD502A | Develop a marketing and sales strategy |
| PRDPOD503A | Coordinate customer service activities |
| PRDPOD504A | Determine needs of customer populations |
| PRDPOD505A | Manage projects |
| PRDPOD506A | Manage client relationships and networks |
| PRDPOD507A | Ensure a safe workplace |
| PRDPOD508A | Prepare tender documentation |
| PRDPOD509A | Identify and secure a property opportunity |

| Code | Title |
|-------------|--|
| PRDPOD510A | Coordinate fit-out of property and facilities |
| PRDPOD511A | Determine space utilisation |
| PRDPOD512A | Contribute to a property feasibility study |
| PRDPOD513A | Assess viability of regeneration options |
| PRDPOD514A | Manage a consultant project team |
| PRDPOD515A | Dispose of property |
| PRDPOD516A | Implement asset maintenance strategy |
| PRDPOD517A | Advise on property investment strategy |
| PRDPOD518A | Implement asset management plan |
| PRDPOD519A | Maintain public relations |
| PRDPOD520A | Develop a tenancy mix strategy |
| PRDPOD521A | Develop and coordinate strata/community management agreement |
| PRDPOD522A | Coordinate facilities and amenities for property users |
| PRDPOD523A | Advise on facilities use and design |
| PRDPOD524A | Monitor performance of property/facility portfolio |
| PRDPOD525A | Implement facilities management plan |
| PRDPOD526A | Coordinate facilities procurement system |
| PRDPOD527A | Coordinate facilities construction/renovation |
| PRDPOD601A | Prepare project design brief and documentation |
| PRDPOD602A | Develop strategic facilities/asset management plan |
| PRDPOD603A | Manage facilities portfolio |
| PRDPOD604A | Develop lifecycle asset management plan |
| PRDPOD605A | Determine performance of assets and facilities |
| PRDPOD606A | Develop facilities procurement system |
| PRDPOD607A | Determine asset regeneration options |
| PRDPOD608A | Develop a property investment strategy |
| PRDPOD609A | Contract to invest in property |
| PRDPOD610A | Plan property portfolio management |

| Code | Title |
|-------------|---|
| PRDPOD611A | Manage performance of property investment |
| PRDPOD612A | Negotiate partnership arrangements |
| PRDPOD613A | Conduct a property investment feasibility study |
| PRDPOD62A | Clarify and confirm property information requirements |
| PRDRE01A | Develop a strategic business plan |
| PRDRE02A | Manage agency performance |
| PRDRE03A | Develop and implement client service strategies |
| PRDRE04A | Manage and monitor effective client service |
| PRDRE05A | Market agency |
| PRDRE06A | Manage human resources |
| PRDRE07A | Implement staff skill development and training |
| PRDRE08A | Manage efficient financial systems |
| PRDRE09A | Implement and monitor financial management systems |
| PRDRE10A | Manage agency risk |
| PRDRE11A | Provide property appraisal |
| PRDRE12A | Establish and expand client base |
| PRDRE13A | Obtain property listings |
| PRDRE14A | Market property |
| PRDRE15A | Undertake property sale by private treaty |
| PRDRE16A | Monitor sales process |
| PRDRE17A | Effectively manage property and account to landlord |
| PRDRE18A | Lease property |
| PRDRE19A | Provide property management services |
| PRDRE20A | Provide strata management services |
| PRDRE21A | Provide property development and marketing services |
| PRDRE22A | Present and explain property reports |
| PRDRE23A | Maintain agency:client relationship |
| PRDRE24A | Prepare asset refurbishment plan |
| PRDRE25A | Respond to property enquiry |

| Code | Title |
|-------------|---|
| PRDRE26A | Conduct property sale by auction |
| PRDRE27A | Monitor chattel auction/clearing sale |
| PRDRE28A | Maintain trust account |
| PRDRE29A | Use and maintain a property information database |
| PRDRE30A | Implement personal marketing plan |
| PRDRE31A | Negotiate effectively with landlords and tenants |
| PRDRE32A | Maintain and protect conditions of rented properties |
| PRDRE33A | Coordinate property inspection |
| PRDRE34A | Maintain key register |
| PRDRE35A | Communicate effectively and accurately with clients |
| PRDRE36A | Process marketing material |
| PRDRE37A | Perform and record property management activities and transactions |
| PRDRE38A | Maintain equipment and facilities |
| PRDRE39A | Prepare and execute documentation |
| PRDSIS01A | Determine client requirements |
| PRDSIS02A | Design a project plan |
| PRDSIS03A | Implement a project plan |
| PRDSIS04A | Determine spatial data requirements to meet the deliverables |
| PRDSIS05A | Determine suitable sources of information for the creation of new spatial data sets |
| PRDSIS06A | Plan data collection and validation |
| PRDSIS07A | Capture new data |
| PRDSIS08A | Obtain and validate existing data |
| PRDSIS09A | Develop and maintain contractual relationships |
| PRDSIS10A | Provide field support services |
| PRDSIS11A | Select, operate and maintain equipment and supplies |
| PRDSIS12A | Transfer personnel and loads |
| PRDSIS13A | Design a spatial data storage system |

| Code | Title |
|-------------|---|
| PRDSIS14A | Integrate spatial data sets |
| PRDSIS15A | Maintain spatial data |
| PRDSIS16A | Store and retrieve spatial data |
| PRDSIS17A | Provide administrative support services |
| PRDSIS18A | Produce project deliverables |
| PRDSIS19A | Collate and interpret data |
| PRDSIS20A | Design project deliverables |
| PRDSIS21A | Finalise and present project deliverables to the client |
| PRDSIS22A | Control and monitor the spatial components of the project |
| PRDSIS23A | Undertake research and development |
| PRDSIS24A | Maintain financial records |
| PRDSIS25A | Lead and supervise teams |
| PRDSIS26A | Participate in process improvement |
| PRDSIS27A | Maintain client relations |
| PRDSIS28A | Respond to client enquiry |
| PRDSIS29A | Collect basic data |
| PRDSSA11A | Administer agency activities |
| PRDSSA17A | Establish and expand client base |
| PRDSSA18A | Apply market knowledge to service business opportunities |
| PRDSSA19A | Respond to enquiry |
| PRDSSA20A | List properties for sale |
| PRDSSA21A | Market property for sale |
| PRDSSA22A | Negotiate sale by private treaty |
| PRDSSA23A | Conduct auction sale |
| PRDSSA24A | Conduct chattel auction/clearing sale |
| PRDSSA25A | Conduct a sale by tender |
| PRDSSA26A | Administer process to completion or abandonment of sale |
| PRDSSA27A | Lease rural property |
| PRDSSA28A | Manage properties for clients |

| Code | Title |
|-------------|--|
| PRDSSA29A | Advise client on sale and purchase alternatives |
| PRDSSA30A | Select stock for sale |
| PRDSSA31A | Prepare stock for sale |
| PRDSSA32A | Conduct livestock sale by auction |
| PRDSSA33A | Arrange buyer and inspections |
| PRDSSA34A | Provide information on alternative use of assets |

Imported units of competency in this Training Package

| Code | Title | Origin |
|------------|--|--------|
| BCGCM2001B | Read and interpret plans and specifications | BCG03 |
| BCGSV5003A | Produce working drawings for residential buildings | BCG03 |
| BCGSV5004A | Apply legislation to urban development and building controls | BCG03 |
| BCGSV5010A | Interact with clients in a regulated environment | BCG03 |
| BCGSV6009A | Implement performance based codes and risk management principles for buildings up to 3 storeys | BCG03 |
| BCGSV6011A | Apply legal procedures to building surveying | BCG03 |
| BCGSV6013A | Co-ordinate asset refurbishment | BCG03 |
| BSAFIN301B | Maintain daily financial records for accounting purposes | TBA |
| BSAFIN302B | Monitor cash control for accounting purposes | TBA |
| BSAFIN501B | Manage payroll records for employee salaries and statutory record-keeping purposes | TBA |
| BSAFIN502B | Monitor and control disbursements within a given budget | TBA |
| BSAINF401B | Supervise an established records system to ensure its integrity | TBA |
| BSAORG301B | Coordinate own work schedule with that of others to achieve agreed team/section goals | TBA |
| BSAORG402B | Plan meetings to enable the stated objectives of the meetings to be met | TBA |
| BSAORG501B | Manage meetings to achieve identified team/section goals | TBA |
| BSATEC301B | Use the advanced functions of a range of office equipment to complete daily tasks | TBA |
| BSATEC302B | Design and develop documents, reports and worksheets | TBA |
| BSATEC303B | Maintain computer files | TBA |
| BSBADM408A | Prepare financial reports | BSB01 |
| BSBADM501A | Manage the establishment and maintenance of a workgroup network | BSB01 |
| BSBADM502A | Manage meetings | BSB01 |
| BSBADM505A | Manage payroll | BSB01 |
| BSBCMN307A | Maintain business resources | BSB01 |

| Code | Title | Origin |
|-------------|--|---------------|
| BSBCMN308A | Maintain financial records | BSB01 |
| BSBCMN313A | Maintain environmental procedures | BSB01 |
| BSBCMN403A | Establish business networks | BSB01 |
| BSBCMN404A | Develop teams and individuals | BSB01 |
| BSBCMN405A | Analyse and present research information | BSB01 |
| BSBCMN406A | Maintain business technology | BSB01 |
| BSBCMN407A | Coordinate business resources | BSB01 |
| BSBCMN408A | Report on financial activity | BSB01 |
| BSBCMN409A | Promote products and services | BSB01 |
| BSBCMN410A | Coordinate implementation of customer service strategies | BSB01 |
| BSBCMN413A | Implement and monitor environmental policies | BSB01 |
| BSBFLM303A | Contribute to effective workplace relationships | TBA |
| BSBFLM404A | Lead work teams | TBA |
| BSBFLM405A | Implement operational plan | TBA |
| BSBFLM502A | Provide leadership in the workplace | TBA |
| BSBFLM504A | Facilitate work teams | TBA |
| BSBFLM505A | Manage operational plan | TBA |
| BSBFLM509A | Promote continuous improvement | TBA |
| BSBFLM511A | Develop a workplace learning environment | TBA |
| BSBHR402A | Recruit and select personnel | BSB01 |
| BSBHR405A | Implement industrial relations procedures | BSB01 |
| BSBHR504A | Manage industrial relations policies and processes | BSB01 |
| BSBMED201A | Use basic medical terminology | BSB01 |
| BSBMGT502A | Manage people performance | BSB01 |
| BSBMGT503A | Prepare budgets and financial plans | BSB01 |
| BSBMGT504A | Manage budgets and financial plans | BSB01 |
| BSBMGT506A | Recruit, select and induct staff | BSB01 |
| BSBMGT507A | Manage environmental performance | BSB01 |
| BSBMGT601A | Contribute to strategic direction | BSB01 |

| Code | Title | Origin |
|-------------|---|---------------|
| BSBMGT602A | Contribute to the development and implementation of strategic plans | BSB01 |
| BSBMGT603A | Review and develop business plans | BSB01 |
| BSBMGT604A | Manage business operations | BSB01 |
| BSBMGT605A | Provide leadership across the organisation | BSB01 |
| BSBMGT606A | Manage customer focus | BSB01 |
| BSBMGT607A | Manage knowledge and information | BSB01 |
| BSBMGT608A | Manage innovation and continuous improvement | BSB01 |
| BSBMGT609A | Manage risk | BSB01 |
| BSBMGT610A | Manage environmental management systems | BSB01 |
| BSBMKG401A | Profile the market | BSB01 |
| BSBMKG402A | Analyse consumer behaviour for specific markets | BSB01 |
| BSBMKG403A | Analyse market data | BSB01 |
| BSBMKG404A | Forecast market and business needs | BSB01 |
| BSBMKG405A | Implement and monitor marketing activities | BSB01 |
| BSBMKG407A | Make a presentation | BSB01 |
| BSBSBM401A | Establish business and legal requirements | BSB01 |
| BSBSBM402A | Undertake financial planning | BSB01 |
| BSBSBM403A | Promote the business | BSB01 |
| BSBSBM404A | Undertake business planning | BSB01 |
| BSBSBM405A | Monitor and manage business operations | BSB01 |
| BSBSBM406A | Manage finances | BSB01 |
| BSBSBM407A | Manage a small team | BSB01 |
| BSXFMI404A | Participate in, lead and facilitate work teams | TBA |
| BSXFMI504A | Participate, lead in and facilitate work teams | TBA |
| BSXFMI511A | Contribute to the development of a workplace learning environment | TBA |
| CHCCS405A | Work effectively with culturally diverse clients and co-workers | CHC02 |
| FNBACC01B | Provide financial and business performance information | FNB99 |

| Code | Title | Origin |
|-------------|---|---------------|
| FNBA30A | Provide management accounting information | FNB99 |
| LMFFT4010A | Identify and calculate production costs | LMF02 |
| PRMPM31A | Process accounts receivable and payable | TBA |
| PRMPM32A | Maintain a cash receipting system | TBA |
| PRMPM35A | Maintain asset management records and control | TBA |
| PRSAS15A | Plan and schedule routine maintenance, repairs and modifications | TBA |
| PRSIR24A | Implement and monitor financial and administration systems | TBA |
| PRSIR25A | Develop and implement a business plan | TBA |
| PRSIR27A | Prepare budgets | TBA |
| PRSIR29A | Establish and implement a marketing strategy | TBA |
| PRSIR31A | Undertake process improvement to reduce costs and improve quality service | TBA |
| PRSIR35A | Monitor and review staff performance | TBA |
| PRSIR37A | Develop and implement a human resource plan | TBA |
| PRSIR38A | Maintain occupational health and safety | TBA |
| PRSIR39A | Manage occupational health and safety in the workplace | TBA |
| PRSSO311A | Prepare and present evidence in court | PRS03 |
| PSPREG402C | Promote client compliance | PSP04 |
| TAADEL401A | Plan and organise group-based delivery | TAA04 |
| TAADEL402A | Facilitate group-based learning | TAA04 |
| TAADEL403A | Facilitate individual learning | TAA04 |
| TAADEL404A | Facilitate work-based learning | TAA04 |
| TAADEL405A | Coordinate and facilitate distance-based learning | TAA04 |
| TAADES401A | Use Training Packages to meet client needs | TAA04 |
| TAADES402A | Design and develop learning programs | TAA04 |

Explanation of the review date

The review date (shown on the title page and in the header of each page) indicates when the Training Package is expected to be reviewed in the light of changes such as changing technologies and circumstances. The review date is not an expiry date. Endorsed Training Packages and their components remain current until they are reviewed or replaced.

Overview

What is a Training Package?

A Training Package is an integrated set of nationally endorsed competency standards, assessment guidelines and Australian Qualifications Framework (AQF) qualifications for a specific industry, industry sector or enterprise.

Each Training Package:

- provides a consistent and reliable set of components for training, recognising and assessing people's skills, and may also have optional support materials
- enables nationally recognised qualifications to be awarded through direct assessment of workplace competencies
- encourages the development and delivery of flexible training which suits individual and industry requirements
- encourages learning and assessment in a work-related environment which leads to verifiable workplace outcomes.

How do Training Packages fit within the National Training Framework?

The National Training Framework is made up of the nationally agreed quality arrangements for the vocational education and training sector, the Australian Quality Training Framework (AQTF), and Training Packages endorsed by the National Training Quality Council (NTQC).

How are Training Packages developed?

Training Packages are developed by Industry Skills Councils or enterprises to meet the identified training needs of specific industries or industry sectors. To gain national endorsement of Training Packages, developers must provide evidence of extensive research, consultation and support within the industry area or enterprise.

How do Training Packages encourage flexibility?

Training Packages describe the skills and knowledge needed to perform effectively in the workplace without prescribing how people should be trained.

Training Packages acknowledge that people can achieve vocational competency in many ways by emphasising what the learner can do, not how or where they learned to do it. For example, some experienced workers might be able to demonstrate competency against the units of competency, and even gain a qualification, without completing a formal training program.

With Training Packages, assessment and training may be conducted at the workplace, off-the-job, at a training organisation, during regular work, or through work experience, work placement, work simulation or any combination of these.

Who can deliver and assess using Training Packages?

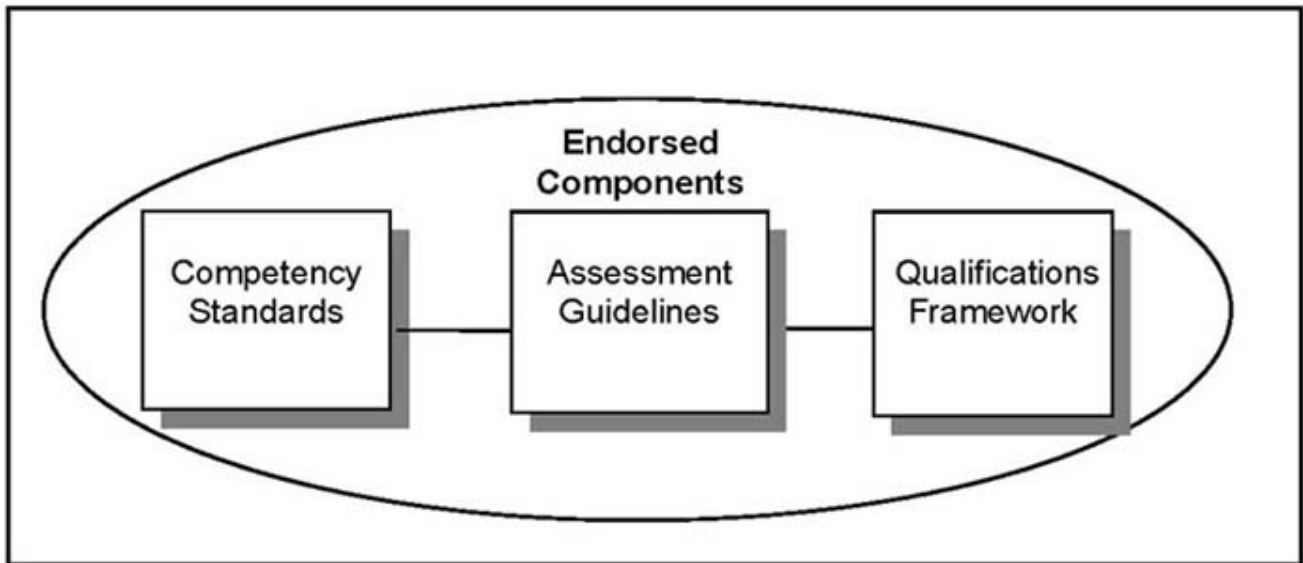
Training and assessment using Training Packages must be conducted by a Registered Training Organisation (RTO) that has the qualifications or specific units of competency on its scope of registration, or that works in partnership with another RTO as specified in the AQTF *Standards for Registered Training Organisations*.

Training Package Components

Training Packages are made up of mandatory components endorsed by the NTQC, and optional support materials.

Training Package Endorsed Components

The nationally endorsed components include the Competency Standards, Assessment Guidelines and Qualifications Framework. These form the basis of training and assessment in the Training Package and, as such, they must be used.



Competency Standards

Each unit of competency identifies a discrete workplace requirement and includes the knowledge and skills that underpin competency as well as language, literacy and numeracy; and occupational health and safety requirements. The units of competency must be adhered to in training and assessment to ensure consistency of outcomes.

Assessment Guidelines

The Assessment Guidelines provide an industry framework to ensure all assessments meet industry needs and nationally agreed standards as expressed in the Training Package and the *Standards for Registered Training Organisations*. The Assessment Guidelines must be followed to ensure the integrity of assessment leading to nationally recognised qualifications.

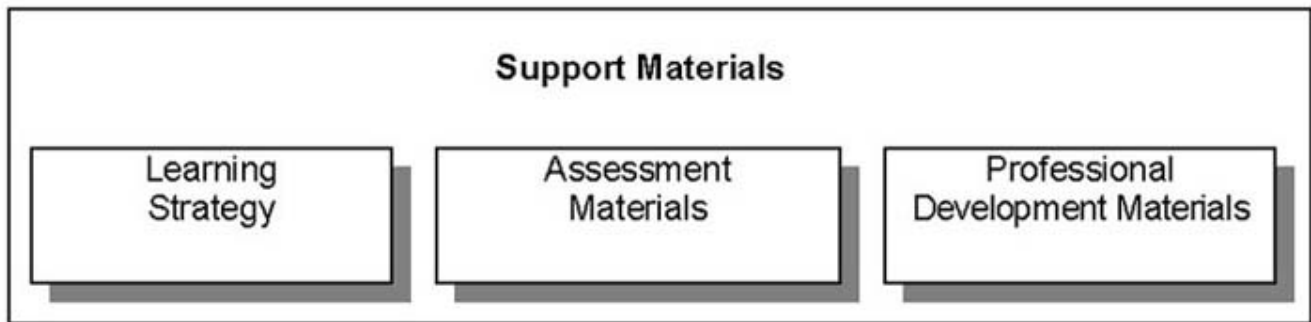
Qualifications Framework

Each Training Package provides details of those units of competency that must be achieved to award AQF qualifications. The rules around which units of competency can be combined to make up a valid AQF qualification in the Training Package are referred to as the 'packaging rules'. The packaging rules must be followed to ensure the integrity of nationally recognised qualifications issued.

Training Package Support Materials

The endorsed components of Training Packages are complemented and supported by optional support materials that provide for choice in the design of training and assessment to meet the needs of industry and learners.

Training Package support materials can relate to single or multiple units of competency, an industry sector, a qualification or the whole Training Package. They tend to fall into one or more of the categories illustrated below.



Training Package support materials are produced by a range of stakeholders such as RTOs, individual trainers and assessors, private and commercial developers and Government agencies.

Where such materials have been quality assured through a process of 'noting' by the NTQC, they display the following official logo. Noted support materials are listed on the National Training Information Service (NTIS), together with a detailed description and information on the type of product and its availability (www.ntis.gov.au).



It is not compulsory to submit support materials for noting; any resources that meet the requirements of the Training Package can be used.

Training Package, Qualification and Unit of Competency Codes

There are agreed conventions for the national codes used for Training Packages and their components. Always use the correct codes, exactly as they appear in the Training Package, **and with the title always following the code.**

Training Package Codes

Each Training Package has a unique five-character national code assigned when the Training Package is endorsed, for example PRD01. The first three characters are letters identifying the Training Package industry coverage and the last two characters are numbers identifying the year of endorsement.

Qualification Codes

Within each Training Package, each qualification has a unique eight-character code, for example PRD30101. The first three letters identify the Training Package; the first number identifies the qualification level (noting that arabic numbers are not used in qualification titles themselves); the next two numbers identify the position in the sequence of the qualification at that level; and the last two numbers identify the year in which the qualification was endorsed. (Where qualifications are added after the initial Training Package endorsement, the last two numbers may differ from other Training Package qualifications as they identify the year in which those particular qualifications were endorsed).

Unit of Competency Codes

Within each Training Package, each unit of competency has a unique code. The unit of competency codes are assigned when the Training Package is endorsed, or when new units of competency are added to an existing endorsed Training Package.

A typical code is made up of 12 characters, normally a mixture of uppercase letters and numbers, as in PRDAC401A. The first three characters signify the Training Package (PRD01 Property Development and Management Training Package in the above example) and up to eight characters, relating to an industry sector, function or skill area, follow. The last character is always a letter and identifies the unit of competency version. The 'A' in the example above indicates that this is the original unit of competency. An incremented version identifier usually means that minor changes have been made. Typically this would mean that wording has changed in the range statement or evidence guide, providing clearer intent. Where changes are made that alter the outcome, a new code is assigned and the title is changed.

Training Package, Qualification and Unit of Competency Titles

There are agreed conventions for titling Training Packages and their components. Always use the correct titles, exactly as they appear in the Training Package, and with the code always placed before the title.

Training Package Titles

The title of each endorsed Training Package is unique and relates the Training Package's broad industry coverage.

Qualification Titles

The title of each endorsed Training Package qualification is unique. Qualification titles use the following sequence:

- firstly, the qualification is identified as either Certificate I, Certificate II, Certificate III, Certificate IV, Diploma or Advanced Diploma
- this is followed by the words 'in' for Certificates I to IV and 'of' for Diploma and Advanced Diploma
- then the industry descriptor follows, for example Telecommunications, and
- if applicable, the occupational or functional stream follows in brackets, for example (Computer Systems).

For example:

- PRD30101 Certificate III in Property (Real Estate)
- PRD30201 Certificate III in Property (Livestock Services)

Unit of Competency Titles

Each unit of competency title is unique. Unit of competency titles describe the competency outcome concisely, and are written in sentence case.

For example:

- PRDAC401A Apply disability awareness to assessing access situations
- PRDAC402A Apply building control legislation to assess small-scale buildings for access

Overview of Training Packages in the Property Services Industry

Effective vocational training, backed by meaningful qualifications, is vital for Australia's prosperity. The Australian Recognition Framework (ARF), which includes nationally agreed quality criteria, endorsed competency standards packaged and aligned to recognised qualifications, and guidelines for assessment, provides a national framework in which Registered Training Organisations (RTOs) and the industry can operate.

Within the agreed framework, RTOs are able to deliver training services which meet the immediate and future employment needs of their clients. RTOs using Training Packages face at least three challenges.

- to provide a practical, cost-effective but high quality service
- to educate trainees to the performance (competency) standards expected in the workplace
- to move from a traditional focus on classroom delivery to one which integrates work experience and education in a variety of learning contexts, including the workplace

Occupational categories covered in the Training Package

PRD01 Property Development and Management Training Package covers major service areas in the Property Services industry. Related occupational categories covered by the Training Package include those for the following ASCO classifications:

- Manager
- Salesperson
- Real estate agent
- Auctioneer
- Consultant
- Project manager

Together with occupational categories not currently included in the ASCO classification for the Stock and Station industry:

- Livestock manager
- Auctioneer
- Branch manager
- Livestock sales manager
- Agency manager

Training Packages in the Property Services industry

There are three endorsed Training Packages in the Property Services industry.

- Property Management and Development, which covers all service areas dealing directly with the sale and management of property assets, particularly real estate, as well as stock and station agency. This volume of PRD01 Property Development and Management Training Package covers the following industry sectors:
 - Real Estate
 - Stock and Station Agency
- Asset Maintenance covers those areas that provide services relating to the physical maintenance of property assets. There are currently six industry sectors in this Training Package. They are:
 - Carpet Cleaning
 - Cleaning Operations
 - Pest Management
 - Waste Management
 - Fire Protection Equipment
 - Fire Safety Systems Inspection

- Asset Security covers the Security and Investigative Services industry, which deals with the security and protection of persons and property assets. There are currently three industry sectors in this Training Package. They are:
 - Security Services
 - Access Security
 - Investigations and Risk Management

For the latest information on all these Training Packages please visit the website of Construction and Property Services Industry Skills Council at <http://www.cpsisc.com.au>

Introduction

Information on the Real Estate and Stock and Station Agency Sectors of the Property Development and Management Training Package

The two industry sectors covered by the Training Package are:

- Real Estate
- Stock and Station Agency

These streams have each been developed as separate projects over a period of time. Additional streams are planned to be added as they receive final industry endorsement. Some streams, therefore, have been finalised earlier than others.

However, as far as possible in the development of the standards, units of competency from other streams in this Training Package have been adopted when like competencies are required. For example, Real Estate units have been adopted in the Stock and Station Agency sector.

Similarly, where possible, other industry or cross-industry standards have been packaged into these qualifications in the interests of national recognition. For example, Business Services units have been adopted when administrative competencies are required, and Frontline Management Initiative units have been adopted to cover managerial requirements.

The streams will stand alone and be useful as they are currently developed and packaged. Under review, however, advice will be taken in identifying unnecessary overlap.

Comment on implementation should be documented for the review as the standards are used within industry. This information will be needed to reach national agreement between stakeholders on a further refined set of industry standards.

Scope and Development of the Training Package-Real Estate Sector

National competency standards for the Real Estate sector of the Property Services industry were first endorsed in 1993 and have recently been subject to a review.

Changing industry needs have meant that it has taken time to reach agreement on the industry requirements, and the Real Estate project intends that the sector be open to further review processes.

Similarities remain between the Real Estate standards and other sectors in this Training Package. It is anticipated that the sectors will focus on identifying further common ground over a future review period, in the interests of more flexible career paths.

Real Estate qualifications

In the packaging of the units of competency, it was found that real estate functions in the workforce are primarily reflected in qualifications at levels III, IV and diploma level. Considerable variation found in the workforce has been reflected in the standards by use of electives, particularly at the operational levels of III and IV. As many real estate agencies are found in the small to medium business sector, it was necessary to enable a mix of sales and property management functions, as well as administrative and general management functions, to be packaged as required.

Differences between workforce needs and licensing requirements in the States and Territories, in addition to the needs of small and large business, indicated maximum flexibility in the qualifications with a nationally agreed core of functions.

Contextualisation

Real Estate sectors may be broadly grouped into the following categories:

- residential sales

- commercial and industrial sales
- property management

Although the Real Estate competency standards have been written in a generic way to incorporate these categories (as reflected in the range of variables), it is recognised that training and assessment may be conducted solely on the basis of one category.

Certificate II arrangements

The Certificate II in Business (Office Administration) may provide a pathway to Real Estate Certificates.

School to work programs

New opportunities for competency-based, school-to-work entry to the industry may be developed for components of Certificate III.

New Apprenticeships

Real Estate has the most placements in the New Apprenticeships arrangements of the sectors in this Training Package. (The other streams are largely waiting on the endorsement of competency standards.)

The number of New Apprenticeships in real estate has grown considerably in the last two years. The national figures are:

- 1998/1999 financial year to date: 2119 placements
- 1997/1998 financial year: 1705 placements

The old system of apprenticeships has now been phased out completely and the new arrangements will be expanded, based on the qualifications in this Training Package.

Language and literacy

The standards were reviewed by the ANTA language and literacy consultant and recommended changes made.

Key competencies in the standards

The key competencies have been identified and incorporated at the end of each unit of competency to ensure the complete information for assessment is available.

Scope and Development of the Training Package-Stock and Station Agency Sector

The Stock and Station Agency industry provides specialist rural services especially relating to livestock and rural properties (broad hectares). People working within the area enter from a range of backgrounds. Occupational classifications include:

- Livestock manager
- Auctioneer
- Branch manager
- Livestock sales manager
- Agency manager

Definition of stock and station agency business

There is no definition of stock and station agency businesses provided by the Australian Bureau of Statistics in the revised ANZIC codes. However, for the purposes of development, agencies which devote a significant portion of their activities to dealing with rural properties and livestock were included.

In addressing the development of the competency standards for the industry, work activity has been defined on the basis of identifiable outcomes in areas significant for performance. The standards provide for functional industry outcomes in agency practice, property marketing services, property management services, livestock services and specialised agency services, and so ensure application across differing environments and occupational classifications.

It is estimated that the industry currently employs more than 7000 people throughout Australia. Operatives who carry out real estate dealings (both urban and rural), livestock transactions and auctioning must be licensed. The extent of licensing varies among States and Territories. However, other than licensing, there are no formal barriers to work within the industry, and many operatives carry out general agency activities without formal qualification or recognition of competency.

The standards have received widespread industry support for their structure, format and usability. Input for development involved large and small enterprises across Australia, and included perspectives from both the public and private sectors.

These standards were developed by a working group comprised of the following organisations and enterprises, in liaison with the Property Services Training Australia (PSTA):

- Property Services Council of NSW
- Department of Fair Trading
- Humble, Power & Co Pty Ltd
- NSW Farmers' Federation
- CLEG-Chris Le Gras & Partners Pty Ltd
- Elders Limited
- Charles Stewart & Co Pty Ltd
- Real Estate Association of NSW
- Wesfarmers Dalgety Ltd

Project consultants The DAT Corporation Pty Ltd were appointed by PSTA in August 1996 to develop the standards in consultation with national representatives of the industry. Consultation associated with the project ranged from direct industry participation in the development and validation of the competency standards to general industry representation from all States and Territories.

In 1999-2000 the Stock and Station Agency standards and packaging were reviewed, which resulted in qualifications being largely integrated with the current Real Estate standards and qualifications.

Project focus

The initial project focus has been on the development of national competency standards for stock and station agents throughout Australia.

This includes standards to cover areas commonly known as:

- agency operations
- selling properties
- managing properties
- livestock dealings
- specialised services

For the purposes of standards development, a functional approach to the industry has been adopted. Functions provide a focus on work outcome areas for the industry. In so doing, the functions highlight areas of commonality between work requirements that appear quite distinct when viewed as a series of occupations. For example, the term 'agency manager' can mean different things among organisations, contexts and companies. However, the competencies are designed for use by companies/enterprises or individuals in particular jobs where they are relevant to their work roles.

There is a relationship between this industry and those of real estate and property management. Each of those industries has dealings with property but it is generally accepted that rural properties have special

requirements because their performance is strongly influenced by seasonal and climatic conditions. The relationship with valuers is not as strong and mainly lies in the area of administration. This is primarily because licensing strictly regulates valuation. In the case of rural business management there are links to the administrative and property management areas.

Stock and station agency businesses forge closer, ongoing relationships with their clients through the nature of the activities undertaken, such as property sale and management for absentee owners, and livestock sales and purchases.

Key competencies in the standards

The key competencies have been identified and incorporated at the end of each unit of competency to ensure the complete information for assessment is available.

Qualifications Framework

The Australian Qualifications Framework

What is the Australian Qualifications Framework?

A brief overview of the Australian Qualifications Framework (AQF) follows. For a full explanation of the AQF see the *AQF Implementation Handbook, 3rd Edition 2002*. You can download it from the Australian Qualifications Advisory Board (AQFAB) website (www.aqf.edu.au) or obtain a hard copy by contacting AQFAB on phone 03 9639 1606 or by emailing AQFAB on aqfab@curriculum.edu.au

The AQF provides a comprehensive, nationally consistent framework for all qualifications in post-compulsory education and training in Australia. In the vocational education and training (VET) sector it assists national consistency for all trainees, learners, employers and providers by enabling national recognition of qualifications and Statements of Attainment.

Training Package qualifications in the VET sector must comply with the titles and guidelines of the AQF. Endorsed Training Packages provide a unique title for each AQF qualification which must always be reproduced accurately.

Qualifications

Training Packages can incorporate the following eight AQF qualifications.

- Certificate I in ...
- Certificate II in ...
- Certificate III in ...
- Certificate IV in ...
- Diploma of ...
- Advanced Diploma of ...
- Vocational Graduate Certificate of ...
- Vocational Graduate Diploma of ...

On completion of the requirements defined in the Training Package, a Registered Training Organisation (RTO) may issue a nationally recognised AQF qualification. Issuance of AQF qualifications must comply with the advice provided in the *AQF Implementation Handbook* and the Australian Quality Training Framework *Standards for Registered Training Organisations*, particularly Standard 10.

Statement of Attainment

Where an AQF qualification is partially achieved through the achievement of one or more endorsed units of competency, an RTO may issue a Statement of Attainment. Issuance of Statements of Attainment must comply with the advice provided in the *AQF Implementation Handbook* and the Australian Quality Training Framework *Standards for Registered Training Organisations*, particularly Standard 10.

Under the *Standards for Registered Training Organisations*, RTOs must recognise the achievement of competencies as recorded on a qualification or Statement of Attainment issued by other RTOs. Given this, recognised competencies can progressively build towards a full AQF qualification.

AQF Guidelines and Learning Outcomes

The *AQF Implementation Handbook* provides a comprehensive guideline for each AQF qualification. A summary of the learning outcome characteristics and their distinguishing features for each VET related AQF qualification is provided below.

Certificate I

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and skills would prepare a person to perform a defined range of activities most of which may be routine and predictable.

Applications may include a variety of employment related skills including preparatory access and participation skills, broad-based induction skills and/or specific workplace skills. They may also include participation in a team or work group.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate knowledge by recall in a narrow range of areas;
- demonstrate basic practical skills, such as the use of relevant tools;
- perform a sequence of routine tasks given clear direction
- receive and pass on messages/information.

Certificate II

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and skills would prepare a person to perform in a range of varied activities or knowledge application where there is a clearly defined range of contexts in which the choice of actions required is usually clear and there is limited complexity in the range of operations to be applied.

Performance of a prescribed range of functions involving known routines and procedures and some accountability for the quality of outcomes.

Applications may include some complex or non-routine activities involving individual responsibility or autonomy and/or collaboration with others as part of a group or team.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate basic operational knowledge in a moderate range of areas;
- apply a defined range of skills;
- apply known solutions to a limited range of predictable problems;
- perform a range of tasks where choice between a limited range of options is required;
- assess and record information from varied sources;
- take limited responsibility for own outputs in work and learning.

Certificate III

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and competencies would cover selecting, adapting and transferring skills and knowledge to new environments and providing technical advice and some leadership in resolution of specified problems. This would be applied across a range of roles in a variety of contexts with some complexity in the extent and choice of options available.

Performance of a defined range of skilled operations, usually within a range of broader related activities involving known routines, methods and procedures, where some discretion and judgement is required in the selection of equipment, services or contingency measures and within known time constraints.

Applications may involve some responsibility for others. Participation in teams including group or team co-ordination may be involved.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate some relevant theoretical knowledge
- apply a range of well-developed skills
- apply known solutions to a variety of predictable problems
- perform processes that require a range of well-developed skills where some discretion and judgement is required
- interpret available information, using discretion and judgement
- take responsibility for own outputs in work and learning
- take limited responsibility for the output of others.

Certificate IV

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and competencies would cover a broad range of varied activities or application in a wider variety of contexts most of which are complex and non-routine. Leadership and guidance are involved when organising activities of self and others as well as contributing to technical solutions of a non-routine or contingency nature.

Performance of a broad range of skilled applications including the requirement to evaluate and analyse current practices, develop new criteria and procedures for performing current practices and provision of some leadership and guidance to others in the application and planning of the skills. Applications involve responsibility for, and limited organisation of, others.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate understanding of a broad knowledge base incorporating some theoretical concepts
- apply solutions to a defined range of unpredictable problems
- identify and apply skill and knowledge areas to a wide variety of contexts, with depth in some areas
- identify, analyse and evaluate information from a variety of sources
- take responsibility for own outputs in relation to specified quality standards
- take limited responsibility for the quantity and quality of the output of others.

Diploma

Characteristics of Learning Outcomes

Breadth, depth and complexity covering planning and initiation of alternative approaches to skills or knowledge applications across a broad range of technical and/or management requirements, evaluation and co-ordination.

The self directed application of knowledge and skills, with substantial depth in some areas where judgement is required in planning and selecting appropriate equipment, services and techniques for self and others.

Applications involve participation in development of strategic initiatives as well as personal responsibility and autonomy in performing complex technical operations or organising others. It may include participation in teams including teams concerned with planning and evaluation functions. Group or team co-ordination may be involved.

The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.

Distinguishing Features of Learning Outcomes

Do the competencies or learning outcomes enable an individual with this qualification to:

- demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas
- analyse and plan approaches to technical problems or management requirements
- transfer and apply theoretical concepts and/or technical or creative skills to a range of situations
- evaluate information, using it to forecast for planning or research purposes
- take responsibility for own outputs in relation to broad quantity and quality parameters
- take some responsibility for the achievement of group outcomes.

Advanced Diploma

Characteristics of Learning Outcomes

Breadth, depth and complexity involving analysis, design, planning, execution and evaluation across a range of technical and/or management functions including development of new criteria or applications or knowledge or procedures.

The application of a significant range of fundamental principles and complex techniques across a wide and often unpredictable variety of contexts in relation to either varied or highly specific functions. Contribution to the development of a broad plan, budget or strategy is involved and accountability and responsibility for self and others in achieving the outcomes is involved.

Applications involve significant judgement in planning, design, technical or leadership/guidance functions related to products, services, operations or procedures.

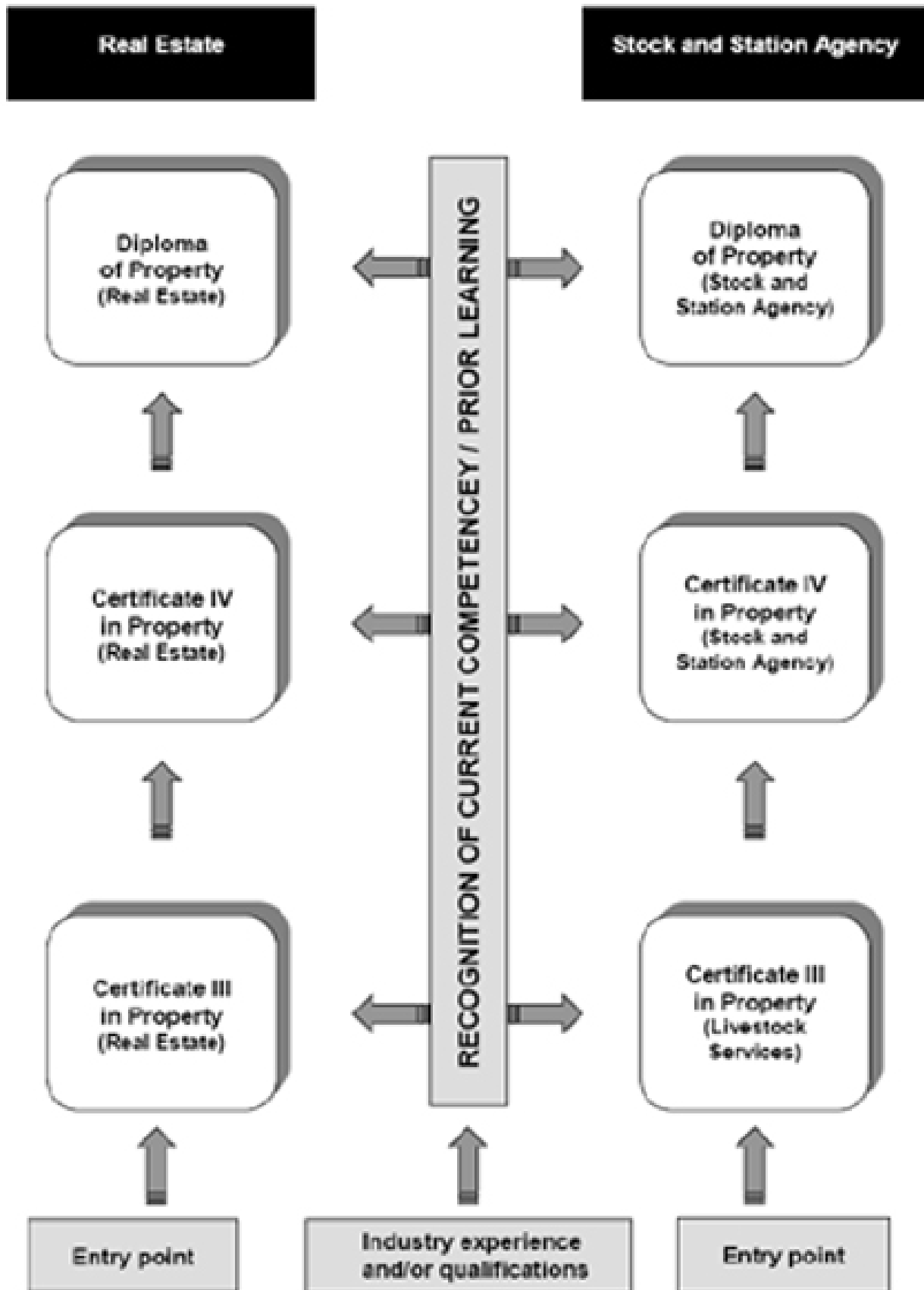
The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.

Distinguishing Features of Learning Outcomes

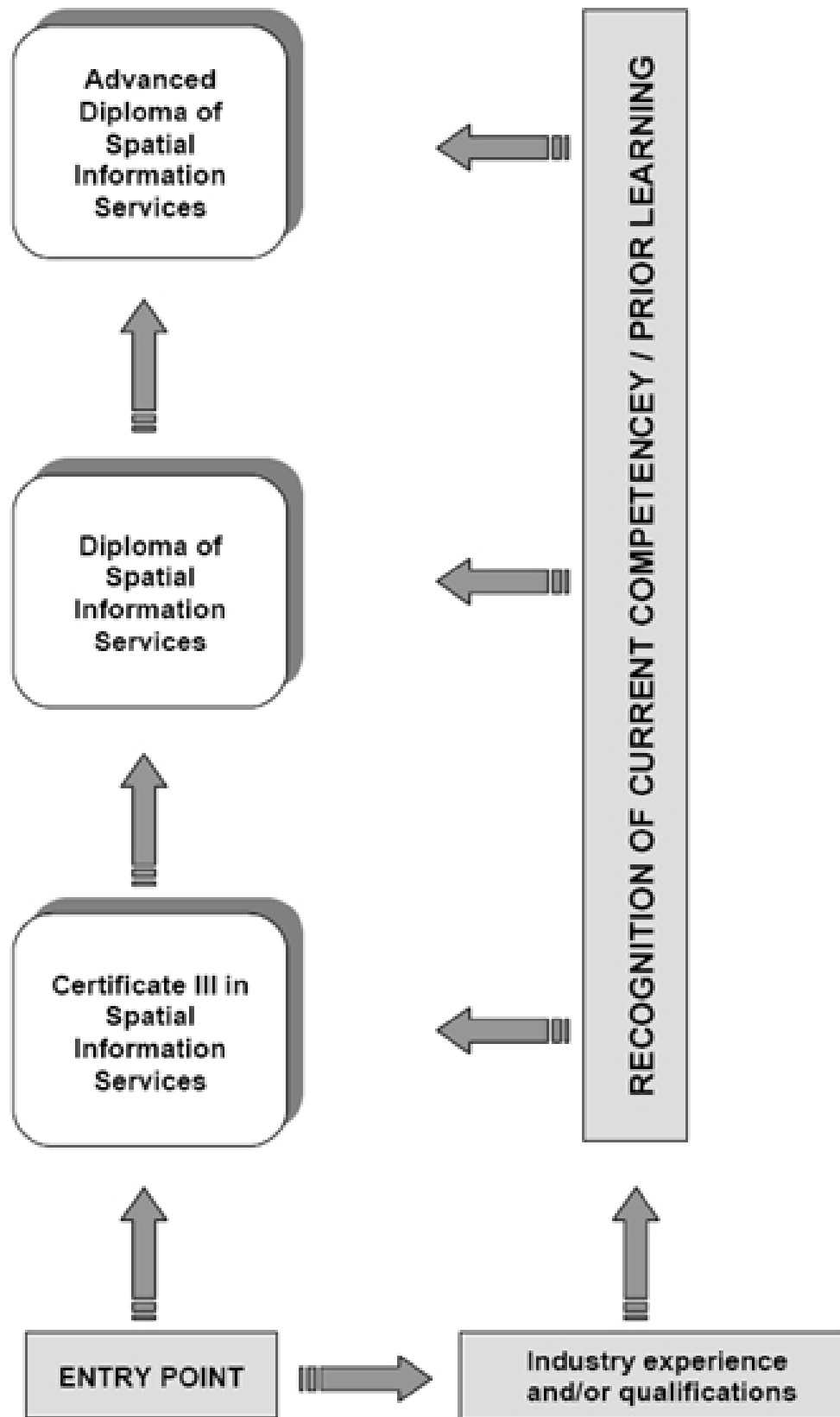
Do the competencies or learning outcomes enable an individual with this qualification to:

- demonstrate understanding of specialised knowledge with depth in some areas
- analyse, diagnose, design and execute judgements across a broad range of technical or management functions
- generate ideas through the analysis of information and concepts at an abstract level
- demonstrate a command of wide-ranging, highly specialised technical, creative or conceptual skills
- demonstrate accountability for personal outputs within broad parameters
- demonstrate accountability for personal and group outcomes within broad parameters.

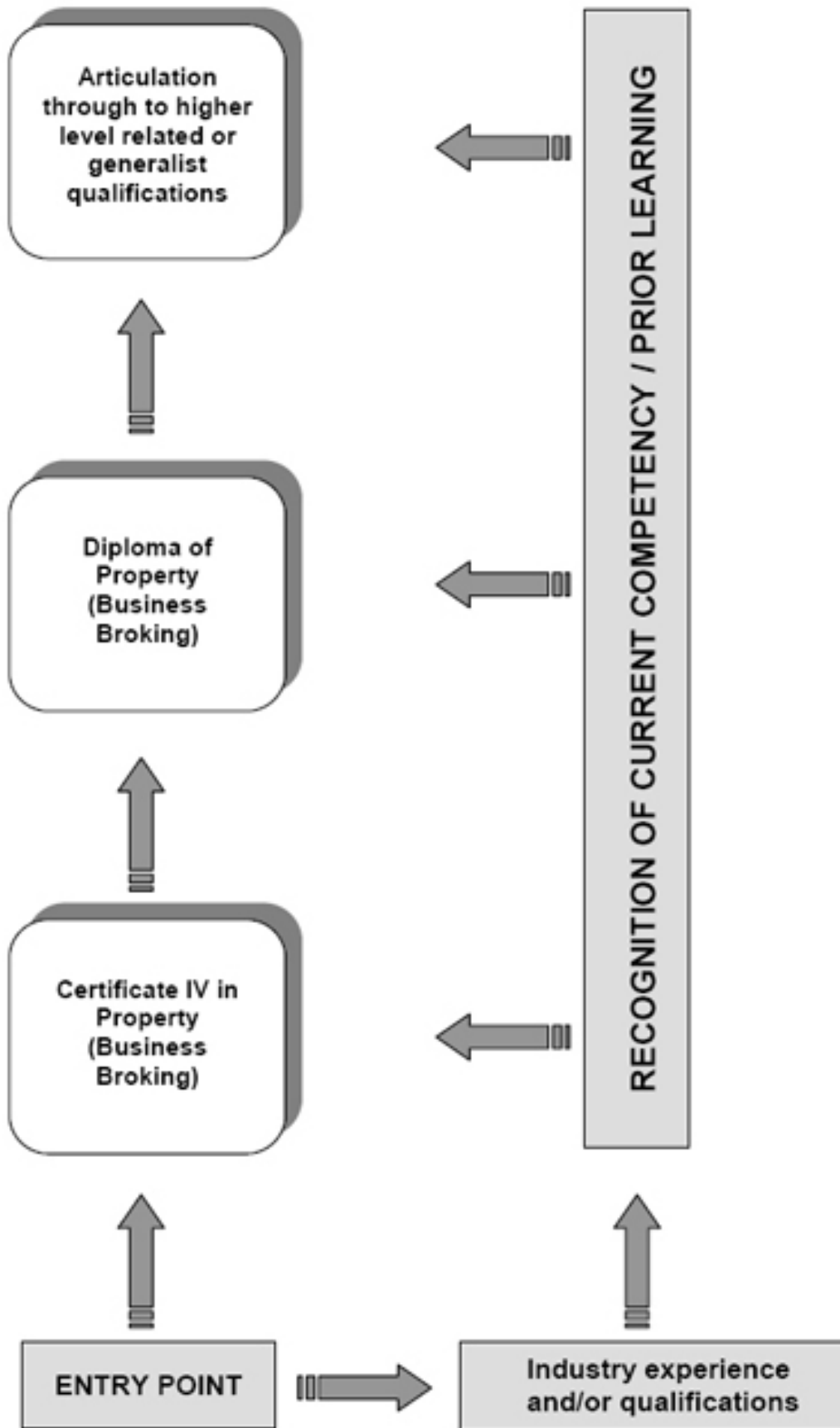
Real Estate/Stock and Station Agency Qualification Flowchart



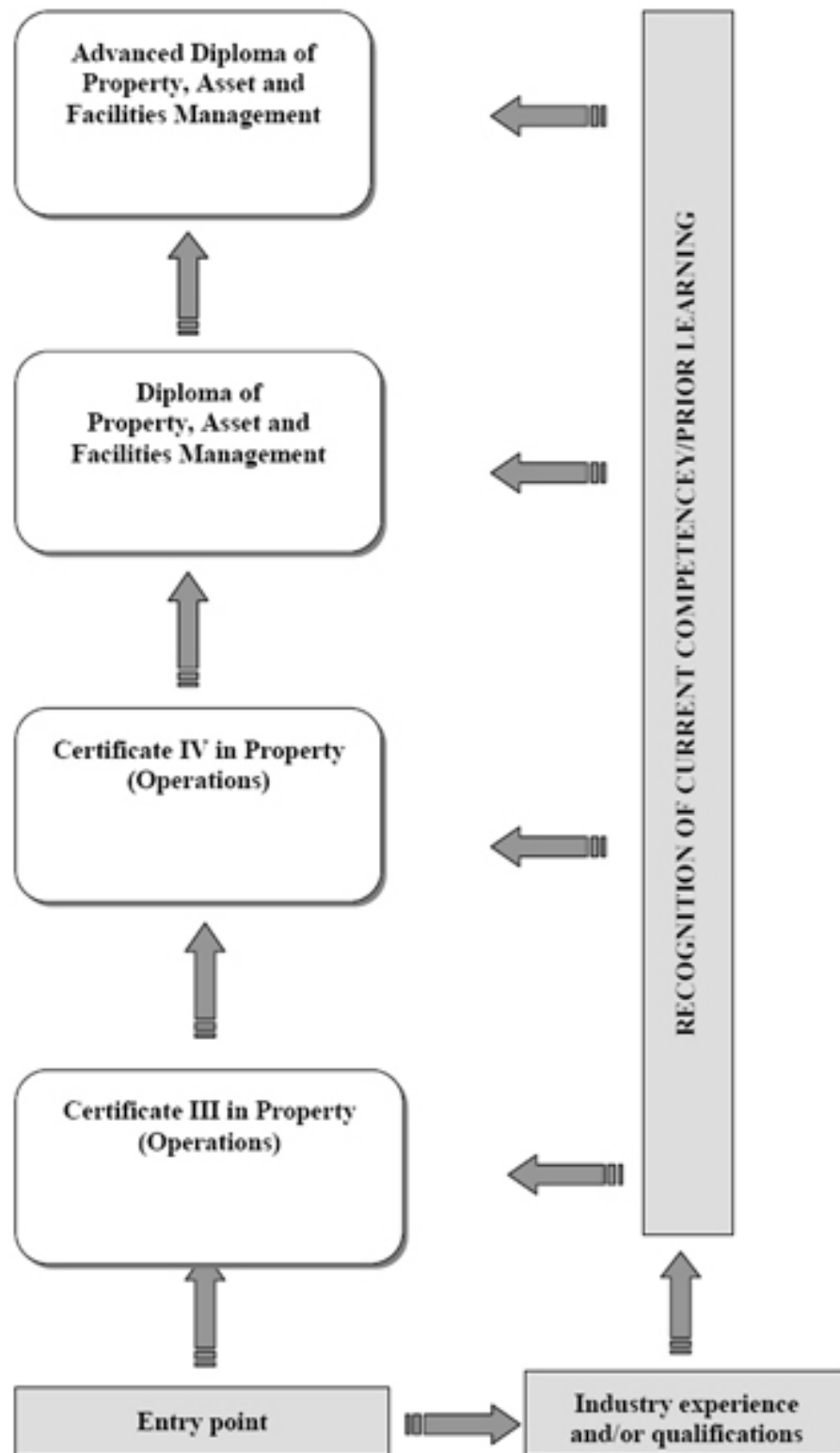
Spatial Information Services Qualification Flowchart



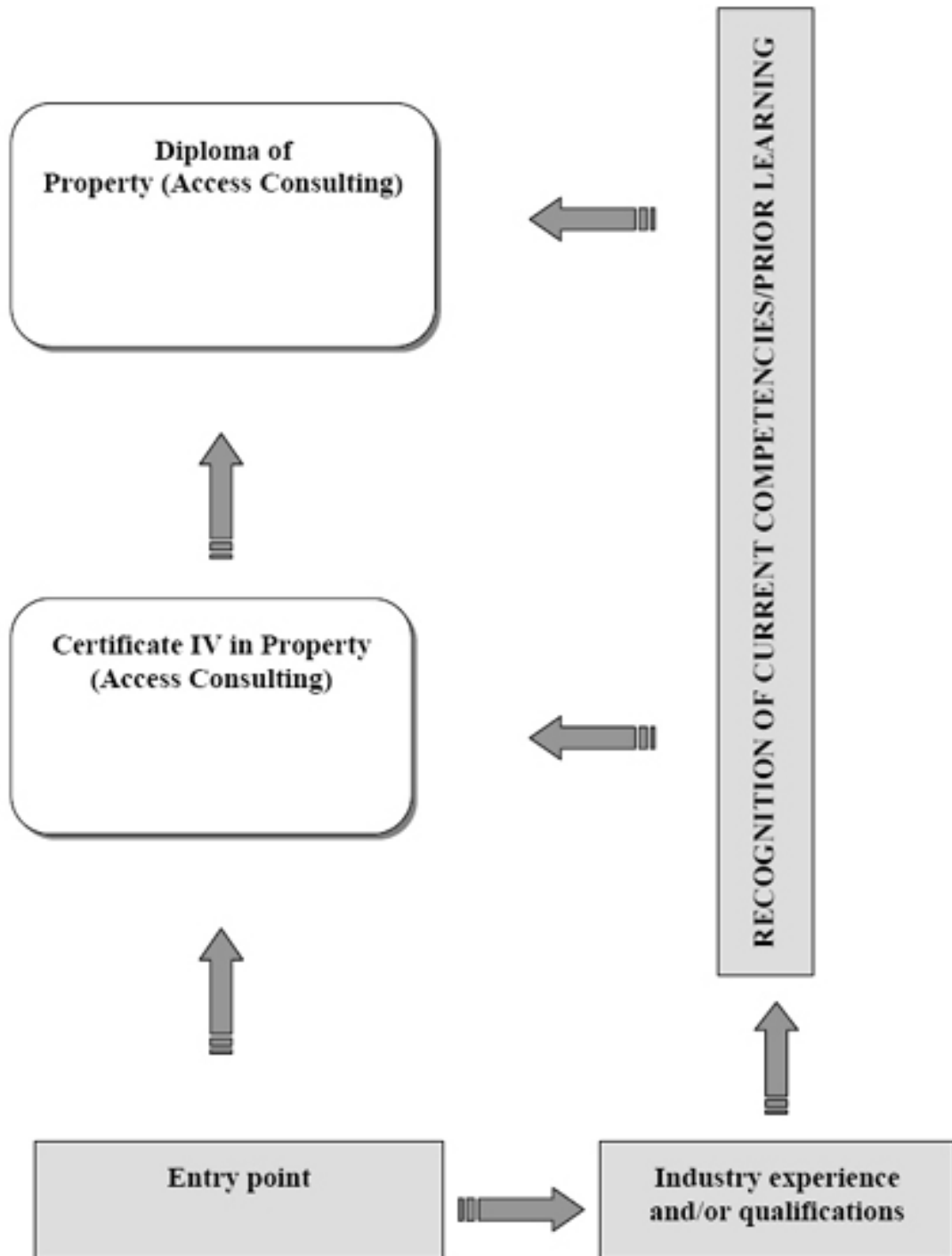
Business Broking Qualification Flowchart



Property Operations and Development Qualifications Flowchart



Access Consulting qualifications flowchart



Qualifications

Units Which May be Accessed as Part of the Stock and Station Agency Qualifications

The following units may be accessed as part of the Stock and Station Agency qualifications. The units are also part of the Real Estate qualifications.

PRDRE01A - Develop a strategic business plan

PRDRE02A - Manage agency performance

PRDRE03A - Develop and implement client service strategies

PRDRE04A - Manage and monitor effective client service

PRDRE05A - Market agency

PRDRE06A - Manage human resources

PRDRE07A - Implement staff skill development and training

PRDRE08A - Manage efficient financial systems

PRDRE09A - Implement and monitor financial management systems

PRDRE10A - Manage agency risk

PRDRE11A - Provide property appraisal

PRDRE17A - Effectively manage property and account to landlord

PRDRE21A - Provide property development and marketing services

PRDRE28A - Maintain trust account

PRDRE35A - Communicate effectively and accurately with clients

BSATEC301B - Use the advanced functions of a range of office equipment to complete daily tasks

BSAFIN501B - Manage payroll records for employee salaries and statutory record-keeping purposes

BSAFIN502B - Monitor and control disbursements within a given budget

BSAORG501B - Manage meetings to achieve identified team/section goals

BSXFMI504A - Participate in, lead and facilitate work teams (at level 5)

Packaging Advice

The aim of combining units of competency into groups acceptable to the industry and to VET providers, is to ensure a crucial link in the quality of education and training and work outcomes. Vocational qualifications need to have a relationship with the performance standards of the industry. Without this relationship, qualifications lack meaning in terms of indicating what the holder of the credential can actually do in relation to industry requirements.

A unit of competency is the minimum recording level in the formal VET system and provides the basis for credit transfer between competency-based courses and between sectors delivering different qualifications in the AQF.

Core and Elective Units

The standards in this Training Package are aligned to qualifications in various combinations of core and elective units. The combinations have been carefully selected to support multiple entry and exit points, as well as flexible delivery of VET. It is essential, therefore, that RTOs take the industry's

packaging and alignment advice into consideration when designing learning and assessment opportunities.

As indicated above, the industry's advice is predicated on the notion that units of competency provide the basis for credit transfer, credit accumulation and articulation or advanced standing from one credential to another, irrespective of the educational sector delivering the credential.

The achievement of a single unit of competency aligned to multiple levels in the AQF means that the unit is assessed once only, and recognition of competency achieved against that unit is carried forward as credit towards the achievement of a qualification at any level in which the unit appears.

Units Packaged at More Than One Level

Qualifications in the AQF assume that differences between qualification levels occur because of:

- increasing levels of complexity in the acquisition and application of knowledge and skill
- greater autonomy in the application of competency in the workplace
- broadening of the job skill base

This principle has been addressed through the packaging of competency units within qualifications. As an individual moves through the qualification framework, the selection of units at any level is governed by:

- the groups of units available at that level
- the selection of units available at that level compared with the individual's current, past and future career aspirations
- current work performance requirements
- recognised industry work structures

This means that two individuals may enter the qualifications framework at different levels and exit at the same level. At either level, they would be subject to the package selection rules at the levels at which they enter the framework.

If one or both move from the qualification level at which they entered, to the same qualification level, each could conceivably emerge from that level with the same combination of core units, but a different combination of core and elective units, and still be eligible for the same qualification.

As a minimum, irrespective of how each arrived at the exit point, both should have the same core units and a prerequisite number of elective units drawn from the total bank of units available at the level at which they exit the framework.

The use of core and elective units at more than one level generally allows for:

- the recognition of key functions within an industry or enterprise that are carried on across levels
- recognition of current competency (or prior learning) based on the achievement of the unit
- an articulation pathway between levels

Units which are only available at certain levels provide for the broadening and deepening of the knowledge and skill component at the level at which the units are located. The key to competency is not in the individual unit, but in the selection and packaging of units for assessment purposes at an AQF level.

Recognition can be achieved in a variety of ways, including:

- against an individual unit which is carried forward as credit towards a qualification at another level of the AQF
- by grouping units and assessing against the group of units in order to determine competency in relation to the requirements of the AQF level at which the units are packaged
- by using a qualification achieved at a lower level as credit towards a qualification located at a higher level

New Apprenticeship Qualifications

New Apprenticeships include all forms of traineeships and have a number of features, including:

- a training agreement which links an industrial award or agreement, signed by the employer and the person in training
- they are employment-based
- the training component is undertaken by an RTO (public or private) and/or employer
- they result in the attainment of a qualification in the AQF
- they require attendance at training delivered by an RTO and/or attendance at work

All the qualifications in this Training Package are open to New Apprenticeship pathways.

New Apprenticeships are slowly being utilised by the industry. At this stage, all New Apprenticeships are sector specific. While the majority of New Apprenticeships will be located at Certificate levels II to IV, all qualification levels addressed in this Package may potentially be used for the purpose of a New Apprenticeship.

Qualifications issued as a result of New Apprenticeships should not be different from qualifications issued as a result of competency demonstrated through other recognition pathways available in the industry.

The Certificate II in Business (Office Administration) may provide a pathway to Real Estate Certificates.

Selection of Units (Career Planning)

The model adopted by the industry avoids the use of corequisite and prerequisite groupings of units, although it should be noted that some units are interdependent and assessment of these may be undertaken concurrently.

The selection of units for assessment and the sequencing of training and assessments, especially where these form part of a formal course of study, are matters which need to be carefully negotiated with the RTO at an enterprise level. In this case, assessors need to take the industry packaging advice under 2.3 Packaging advice on page 19.

Units defined as 'core' units provide common ground across the industry for training, assessment and recognition activities. Elective units take into account individual or enterprise variations and requirements, and provide for flexibility in course design, delivery, and assessment.

Various combinations of core and elective units may be required, depending on the particular occupational or service niche occupied by the candidate.

PRD30101 Certificate III in Property (Real Estate)

To achieve recognition at Certificate III, the candidate for recognition must demonstrate competency in all 7 specified core units and 5 of the elective units (total of 12 units).

| Core units | |
|-----------------------|---|
| PRDRE23A | Maintain agency:client relationship |
| PRDRE25A | Respond to property enquiry |
| PRDRE33A | Coordinate property inspection |
| PRDRE34A | Maintain key register |
| PRDRE35A | Communicate effectively and accurately with clients |
| PRDRE36A | Process marketing material |
| BSATEC303B | Maintain computer files |
| Elective units | |
| PRDRE12A | Establish and expand client base |
| PRDRE14A | Market property |
| PRDRE16A | Monitor sales process |
| PRDRE26A | Conduct property sale by auction |
| PRDRE29A | Use and maintain a property information database |
| PRDRE30A | Implement personal marketing plan |
| PRDRE37A | Perform and record property management activities and transactions |
| PRDRE38A | Maintain equipment and facilities |
| PRSAS15A | Plan and schedule routine maintenance, repairs and modifications |
| BSATEC301B | Use the advanced functions of a range of office equipment to complete daily tasks |
| BSATEC302B | Design and develop documents, reports and worksheets |
| BSAFIN301B | Maintain daily financial records for accounting purposes |
| BSAFIN302B | Monitor cash control for accounting purposes |
| BSAORG301B | Coordinate own work schedule with that of others to achieve agreed team/section goals |

PRD30201 Certificate III in Property (Livestock Services)

To achieve recognition at Certificate III, the candidate for recognition must demonstrate competency in all 8 specified core units and in 1 of the elective units (total of 9 units).

| Core units | |
|-----------------------|---|
| PRDSSA17A | Establish and expand client base |
| PRDSSA19A | Respond to enquiry |
| PRDSSA29A | Advise client on sale and purchase alternatives |
| PRDSSA30A | Select Stock for sale |
| PRDSSA31A | Prepare stock for sale |
| PRDSSA33A | Arrange buyer and inspections |
| PRDRE35A | Communicate effectively and accurately with clients |
| BSATEC301B | Use the advanced functions of a range of office equipment to complete daily tasks |
| Elective units | |
| PRDSSA24A | Conduct chattel auction/clearing sale |
| PRDSSA32A | Conduct livestock sale by auction |
| PRMPM31A | Process accounts receivable and payable |

PRD30301 Certificate III in Spatial Information Services

To achieve recognition at Certificate III, the candidate for recognition must demonstrate competency in 7 core units plus 2 elective units (total of 9 units).

| Core units | |
|-----------------------|---|
| PRDSIS15A | Maintain spatial data |
| PRDSIS16A | Store and retrieve spatial data |
| PRDSIS26A | Participate in process improvement |
| PRDSIS28A | Respond to client enquiry |
| PRDSIS29A | Collect basic data |
| PRSIR38A | Maintain occupational health and safety |
| BSBFLM303A | Contribute to effective workplace relationships |
| Elective units | |
| PRDSIS10A | Provide field support services |
| PRDSIS11A | Select, operate and maintain equipment and supplies |
| PRDSIS12A | Transfer personnel and loads |
| PRDSIS17A | Provide administrative support services |

PRD30504 Certificate III in Property (Operations)

To achieve recognition at Certificate III level, the candidate for recognition must demonstrate competency in 11 units:

- all 8 specified core units, plus
- 3 specialist elective units.

One of the elective units may be chosen from any other endorsed Training Package at AQF level 3. The elective unit must contribute to a valid, industry supported vocational outcome.

| Core units (complete all 8) | |
|---|--|
| PRDPOD301A | Work effectively in the property industry |
| PRDPOD302A | Meet customer needs and expectations |
| PRDPOD303A | Maintain workplace safety |
| PRDPOD304A | Identify risks and opportunities |
| PRDPOD305A | Monitor building facilities |
| PRDPOD306A | Collect and process property information |
| BSBFLM303A | Contribute to effective workplace relationships |
| PRDRE35A | Communicate effectively and accurately with clients |
| Specialist elective units (complete 3) | |
| PRDPOD307A | Undertake property inspection |
| PRDPOD308A | Work effectively in the strata/community management area |
| BSBCMN307A | Maintain business resources |
| BSBCMN308A | Maintain financial records |
| BSBCMN313A | Maintain environmental procedures |

PRD40101 Certificate IV in Property (Real Estate)

To achieve recognition at Certificate IV, the candidate for recognition must have demonstrated competency in all 9 specified core units and 8 elective units (total of 17 units).

| Core units | |
|-----------------------|--|
| PRDRE10A | Manage agency risk |
| PRDRE11A | Provide property appraisal |
| PRDRE12A | Establish and expand client base |
| PRDRE13A | Obtain property listings |
| PRDRE14A | Market property |
| PRDRE22A | Present and explain property reports |
| PRDRE30A | Implement personal marketing plan |
| PRDRE37A | Perform and record property management activities and transactions |
| PRDPOD62A | Clarify and confirm property information requirements |
| Elective units | |
| PRDRE07A | Implement staff skill development and training |
| PRDRE15A | Undertake property sale by private treaty |
| PRDRE16A | Monitor sales process |
| PRDRE17A | Effectively manage property and account to landlord |
| PRDRE18A | Lease property |
| PRDRE19A | Provide property management services |
| PRDRE20A | Provide strata management services |
| PRDRE21A | Provide property development and marketing services |
| PRDRE24A | Prepare asset refurbishment plan |
| PRDRE26A | Conduct property sale by auction |
| PRDRE27A | Monitor chattel auction/clearing sale |
| PRDRE28A | Maintain trust account |
| PRDRE31A | Negotiate effectively with landlords and tenants |
| PRDRE32A | Maintain and protect conditions of rented properties |
| PRDRE39A | Prepare and execute documentation |
| BSAFIN301B | Maintain daily financial records for accounting purposes |

| | |
|------------|---|
| BSAINF401B | Supervise an established records system to ensure its integrity |
| BSAORG402B | Plan meetings to enable the stated objectives of the meetings to be met |
| BSXFMI404A | Participate in, lead and facilitate work teams (at level 4) |

PRD40201 Certificate IV in Property (Stock and Station Agency)

To achieve recognition at Certificate IV, the candidate for recognition must have demonstrated competency in all 9 specified core units and 4 elective units (total of 13 units).

| Core units | |
|-----------------------|--|
| PRDSSA11A | Administer agency activities |
| PRDSSA18A | Apply market knowledge to service business opportunities |
| PRDSSA20A | List properties for sale |
| PRDSSA21A | Market property for sale |
| PRDSSA22A | Negotiate sale by private treaty |
| PRDSSA26A | Administer process to completion or abandonment of sale |
| PRDSSA34A | Provide information on alternative use of assets |
| PRDRE10A | Manage agency risk |
| PRDRE11A | Provide property appraisal |
| Elective units | |
| PRDSSA23A | Conduct auction sale |
| PRDSSA25A | Conduct a sale by tender |
| PRDSSA27A | Lease rural property |
| PRDSSA28A | Manage properties for clients |
| PRDRE07A | Implement staff skill development and training |
| PRDRE28A | Maintain trust account |
| PRMPM31A | Process accounts receivable and payable |
| PRMPM32A | Maintain a cash receipting system |
| PRMPM35A | Maintain asset management records and control |

PRD40403 Certificate IV in Property (Business Broking)

To achieve the Certificate IV the candidate for recognition must have demonstrated competency against all seven core units plus five elective units. Candidates must select four or five electives from the list below. In cases where four electives are chosen, one further elective unit must be undertaken and selected from any endorsed Training Package qualification aligned at the Certificate IV level.

| Core units | |
|-----------------------|---|
| PRDBB01A | Work effectively in the business broking sector |
| PRDBB02A | Obtain prospects for listing |
| PRDBB03A | Appraise business |
| PRDBB04A | List business for sale |
| PRDBB05A | Promote and market listed business |
| PRDBB06A | Negotiate and execute sales |
| PRDBB09A | Manage agency risk |
| Elective units | |
| PRDRE28A | Maintain trust account |
| BSBSBM401A | Establish business and legal requirements |
| BSBSBM402A | Undertake financial planning |
| BSBSBM403A | Promote the business |
| BSBSBM404A | Undertake business planning |
| BSBSBM405A | Monitor and manage business operations |
| BSBSBM406A | Manage finances |
| BSBSBM407A | Manage a small team |
| BSBMKG401A | Profile the market |
| BSBMKG402A | Analyse consumer behaviour for specific markets |
| BSBMKG403A | Analyse market data |
| BSBMKG404A | Forecast market and business needs |
| BSBMKG405A | Implement and monitor marketing activities |
| BSBMKG407A | Make a presentation |
| BSBCM403A | Establish business networks |
| BSBCM404A | Develop teams and individuals |
| BSBCM405A | Analyse and present research information |

| | |
|------------|--|
| BSBCM406A | Maintain business technology |
| BSBCM407A | Coordinate business resources |
| BSBCM408A | Report on financial activity |
| BSBCM410A | Coordinate implementation of customer service strategies |
| BSBFLM404A | Lead work teams |

PRD40504 Certificate IV in Property (Operations)

To achieve recognition at Certificate IV level, the candidate for recognition must demonstrate competency in 18 units:

- all 11 specified core units, plus
- 3 common elective units, and
- 4 specialist elective units.

Two of the common elective units may be chosen from any other endorsed Training Package at AQF level 4. The elective units must contribute to a valid, industry supported vocational outcome.

| Core units (complete all 11) | |
|---|--|
| PRDPOD401A | Monitor a safe workplace |
| PRDPOD402A | Plan and coordinate property and facility inspection |
| PRDPOD403A | Analyse resource use in building operations |
| PRDPOD404A | Analyse risks and opportunities |
| PRDPOD405A | Implement customer service strategies |
| PRDPOD406A | Coordinate maintenance and repair of properties and facilities |
| PRDPOD407A | Analyse property and facility information |
| PRDPOD408A | Provide leadership in the property industry |
| PRDPOD409A | Participate in contract development and establishment |
| PRDPOD410A | Implement and monitor procurement processes |
| BSBMCMN403A | Establish business networks |
| Common elective units (complete 3) | |
| BSBCM404A | Develop teams and individuals |
| BSBCM406A | Maintain business technology |
| BSBCM407A | Coordinate business resources |
| BSBCM408A | Report on financial activity |
| BSBCM409A | Promote products and services |
| BSBCM413A | Implement and monitor environmental policies |
| BSBFLM404A | Lead work teams |
| BSBFLM405A | Implement operational plan |
| BSBMKG407A | Make a presentation |
| BSBSBM406A | Manage finances |

| Specialist elective units (complete 4) | |
|---|--|
| PRDPOD411A | Contribute to the development of a tenancy mix strategy |
| PRDPOD412A | Participate in research of property investment |
| PRDPOD413A | Contribute to lifecycle maintenance strategy |
| PRDPOD414A | Facilitate meetings |
| PRDPOD415A | Arrange the lease of space |
| PRDPOD416A | Monitor space use |
| PRDPOD417A | Monitor service requirements |
| PRDPOD418A | Advise on performance of asset |
| PRDPOD419A | Occupy space |
| PRDPOD420A | Coordinate fit-out of property and facilities |
| PRDPOD421A | Coordinate construction contract |
| PRDPOD422A | Maintain asset management system |
| PRDPOD423A | Arrange valuation of facilities and assets |
| PRDPOD424A | Promote process improvement |
| PRDPOD425A | Select and appoint contractors |
| PRDPOD426A | Manage conflicts and disputes |
| PRDPOD427A | Assess and implement strata/community management agreement |
| PRDRE28A | Maintain trust account |

PRD40605 Certificate IV in Property (Access Consulting)

Access consultants holding the Certificate IV in Property (Access Consulting) may work alone or as part of a team and would typically conduct access audits and provide advice on a range of access issues depending on their area of expertise. Access consultants working in the building industry would provide access advice in relation to the Deemed-to-Satisfy provisions of building legislation.

To achieve recognition at Certificate IV level, the candidate must demonstrate competency in 20 units:

- all 11 specified core units, plus
- 9 elective units.

The elective units must include a minimum of 7 units from Group A. Candidates can choose to select the remaining electives from either Group A or Group B elective units.

| Core units | |
|---------------------------------|---|
| BSBMED201A | Use basic medical terminology |
| CHCCS405A | Work effectively with culturally diverse clients and co-workers |
| PRDAC401A | Apply disability awareness to assessing access situations |
| PRDAC404A | Communicate effectively as an access consultant |
| PRDAC415A | Contribute to team effectiveness |
| PRDAC417A | Follow site occupational health and safety requirements |
| PRDAC418A | Manage risk |
| PRDAC419A | Prepare access reports |
| PRDAC424A | Research and analyse information on the provision of access |
| PRDAC425A | Work effectively as an access consultant |
| PSPREG402C | Promote client compliance |
| Elective units - Group A | |
| BCGCM2001B | Read and interpret plans and specifications |
| LMFFT4010A | Identify and calculate production costs |
| PRDAC402A | Apply building control legislation to assess small-scale buildings for access |
| PRDAC403A | Assess construction plans |
| PRDAC405A | Conduct a building access audit |
| PRDAC406A | Conduct a playground access audit |
| PRDAC407A | Conduct a streetscape access audit |
| PRDAC408A | Conduct a transport conveyance and boarding device access audit |
| PRDAC409A | Conduct a transport premises access audit |

| | |
|---------------------------------|--|
| PRDAC410A | Conduct an aged care facility access audit |
| PRDAC411A | Conduct an educational facility access audit |
| PRDAC412A | Conduct an outdoor recreation area access audit |
| PRDAC413A | Contribute effectively to building development teams |
| PRDAC414A | Contribute to policy development |
| PRDAC416A | Facilitate the development of Disability Discrimination Act Action Plans |
| PRDAC420A | Prepare, deliver and evaluate public education sessions |
| PRDAC421A | Provide access advice on building fitout |
| PRDAC422A | Provide access advice on building renovations |
| PRDAC423A | Provide access advice on the provision of services |
| PRDPOD414A | Facilitate meetings |
| PRDPOD426A | Manage conflict and disputes |
| PRSSO311A | Prepare and present evidence in court |
| TAADEL401A | Plan and organise group-based delivery |
| TAADEL402A | Facilitate group-based learning |
| TAADEL403A | Facilitate individual learning |
| TAADEL404A | Facilitate work-based learning |
| TAADEL405A | Coordinate and facilitate distance-based learning |
| TAADES401A | Use Training Packages to meet client needs |
| TAADES402A | Design and develop learning programs |
| Elective units - Group B | |
| BSBHR402A | Recruit and select personnel |
| BSBHR405A | Implement industrial relations procedures |
| BSBSBM401A | Establish business and legal requirements |
| BSBSBM402A | Undertake financial planning |
| BSBSBM403A | Promote the business |
| BSBSBM404A | Undertake business planning |
| BSBSBM405A | Monitor and manage business operations |
| BSBSBM406A | Manage finances |

| | |
|------------|---------------------|
| BSBSBM407A | Manage a small team |
|------------|---------------------|

PRD50101 Diploma of Property (Real Estate)

To achieve the Diploma, the candidate for recognition must have demonstrated competency against all 14 specified core units, 1 elective unit at Diploma level, and the remaining 9 core units in Certificate IV (total of 24 units).

| Core units | |
|-----------------------|--|
| PRDRE01A | Develop a strategic business plan |
| PRDRE02A | Manage agency performance |
| PRDRE03A | Develop and implement client service strategies |
| PRDRE04A | Manage and monitor effective client service |
| PRDRE05A | Market agency |
| PRDRE06A | Manage human resources |
| PRDRE08A | Manage efficient financial systems |
| PRDRE09A | Implement and monitor financial management systems |
| PRDRE19A | Provide property management services |
| PRDRE28A | Maintain trust account |
| BSAFIN501B | Manage payroll records for employee salaries and statutory record keeping purposes |
| BSAFIN502B | Monitor and control disbursements within a given budget |
| BSXFMI504A | Participate in, lead and facilitate work teams (at level 5) |
| BSXFMI511A | Contribute to the development of a workplace learning environment |
| Elective units | |
| PRDRE17A | Effectively manage property and account to landlord |
| PRDRE21A | Provide property development and marketing services |
| BSAORG501B | Manage meetings to achieve identified team/section goals |

PRD50201 Diploma of Property (Stock and Station Agency)

To achieve the Diploma, the candidate for recognition must have demonstrated competency against all 13 specified core units, 1 elective unit at Diploma level, and the 9 core units in Certificate IV (total of 23 units).

| Core units | |
|-----------------------|--|
| PRDRE01A | Develop a strategic business plan |
| PRDRE02A | Manage agency performance |
| PRDRE03A | Develop and implement client service strategies |
| PRDRE04A | Manage and monitor effective client service |
| PRDRE05A | Market agency |
| PRDRE06A | Manage human resources |
| PRDRE08A | Manage efficient financial systems |
| PRDRE09A | Implement and monitor financial management systems |
| PRDRE28A | Maintain trust account |
| BSAFIN501B | Manage payroll records for employee salaries and statutory record keeping purposes |
| BSAFIN502B | Monitor and control disbursements within a given budget |
| BSXFMI504A | Participate in, lead and facilitate work teams (at level 5) |
| BSXFMI511A | Contribute to the development of a workplace learning environment |
| Elective units | |
| PRDRE17A | Effectively manage property and account to landlord |
| PRDRE21A | Provide property development and marketing services |
| BSAORG501B | Manage meetings to achieve identified team/section goals |

PRD50301 Diploma of Spatial Information Services

To achieve the Diploma, the candidate for recognition must have demonstrated competency against 11 core units, plus 4 elective units (total of 15 units).

| Core units | |
|-----------------------|---|
| PRDSIS04A | Determine spatial data requirements to meet the deliverables |
| PRDSIS06A | Plan data collection and validation |
| PRDSIS07A | Capture new data |
| PRDSIS08A | Obtain and validate existing data |
| PRDSIS14A | Integrate spatial data sets |
| PRDSIS15A | Maintain spatial data |
| PRDSIS16A | Store and retrieve spatial data |
| PRDSIS18A | Produce project deliverables |
| PRDSIS19A | Collate and interpret data |
| PRDSIS22A | Control and monitor the spatial components of the project |
| PRSIR39A | Manage occupational health and safety in the workplace |
| Elective units | |
| PRDSIS03A | Implement a project plan |
| PRDSIS05A | Determine suitable sources of information for the creation of new spatial data sets |
| PRDSIS13A | Design a spatial data storage system |
| PRDSIS20A | Design project deliverables |
| PRDSIS24A | Maintain financial records |
| PRDSIS25A | Lead and supervise teams |
| PRDSIS27A | Maintain client relations |
| PRSIR31A | Undertake process improvement to reduce costs and improve quality service |

PRD50403 Diploma of Property (Business Broking)

To achieve the Diploma, the candidate for recognition must have demonstrated competency against all 22 core plus 2 elective units. Candidates must select one or two electives from the list below. In cases where one elective is chosen, one further elective unit must be undertaken and selected from any endorsed Training Package qualification aligned at the Diploma level.

| Core units | |
|-----------------------|---|
| PRDBB01A | Work effectively in the business broking sector |
| PRDBB02A | Obtain prospects for listing |
| PRDBB03A | Appraise business |
| PRDBB04A | List business for sale |
| PRDBB05A | Promote and market listed business |
| PRDBB06A | Negotiate and execute sales |
| PRDBB07A | Merge or acquire a business |
| PRDBB08A | Value a business |
| PRDBB09A | Manage agency risk |
| PRDRE01A | Develop a strategic business plan |
| PRDRE02A | Manage agency performance |
| PRDRE03A | Develop and implement client service strategies |
| PRDRE04A | Manage and monitor effective client service |
| PRDRE05A | Market agency |
| PRDRE06A | Manage human resources |
| PRDRE08A | Manage efficient financial systems |
| PRDRE09A | Implement and monitor financial management systems |
| PRDRE28A | Maintain trust account |
| BSBADM505A | Manage payroll |
| BSBADM408A | Prepare financial reports |
| BSBFLM504A | Facilitate work teams |
| BSBFLM511A | Develop a workplace learning environment |
| Elective units | |
| BSBADM502A | Manage meetings |
| BSBADM501A | Manage the establishment and maintenance of a workgroup network |

| | |
|------------|--|
| FNBACC01B | Provide financial and business performance information |
| FNBACC30A | Provide management accounting information |
| BSBFLM502A | Provide leadership in the workplace |
| BSBFLM509A | Promote continuous improvement |

PRD50504 Diploma of Property, Asset and Facility Management

To achieve recognition at Diploma level, the candidate for recognition must demonstrate competency in 16 units:

- 8 of the specified common elective units, plus
- 8 of the specialist elective units.

Two of the common elective units may be chosen from any other endorsed Training Package at AQF level 5.

Two of the specialist elective units may be chosen from any other endorsed Training Package at AQF level 5. The elective units must contribute to a valid, industry supported vocational outcome.

| Common elective units (complete 8) | |
|---|---|
| PRDPOD501A | Coordinate risk management systems |
| PRDPOD502A | Develop marketing and sales strategy |
| PRDPOD503A | Coordinate customer service activities |
| PRDPOD504A | Determine needs of customer populations |
| PRDPOD505A | Manage projects |
| PRDPOD506A | Manage client relationships and networks |
| PRDPOD507A | Ensure a safe workplace |
| PRDPOD508A | Prepare tender documentation |
| BSBFLM505A | Manage operational plan |
| BSBMGT502A | Manage people performance |
| BSBMGT503A | Prepare budgets and financial plans |
| BSBMGT504A | Manage budgets and financial plans |
| BSBMGT506A | Recruit, select and induct staff |
| BSBMGT507A | Manage environmental performance |
| Specialist elective units (complete 8 from any of the 3 areas) | |
| Development | |
| PRDPOD509A | Identify and secure a property opportunity |
| PRDPOD510A | Coordinate fit-out of property and facilities |
| PRDPOD511A | Determine space utilisation |
| PRDPOD512A | Contribute to a detailed property feasibility study |
| PRDPOD513A | Assess viability of regeneration options |

| | |
|-------------------|---|
| PRDPOD514A | Manage a consultant project team |
| PRDPOD515A | Dispose of property |
| Management | |
| PRDPOD516A | Implement asset maintenance strategy |
| PRDPOD517A | Advise on property investment strategy |
| PRDPOD518A | Implement asset management plan |
| PRDPOD519A | Maintain public relations |
| PRDPOD520A | Develop a tenancy mix strategy |
| PRDPOD521A | Develop strata/community management agreement |
| Facilities | |
| PRDPOD522A | Provide facilities and amenities for property users |
| PRDPOD523A | Advise on facilities use and design |
| PRDPOD524A | Monitor performance of property/facility portfolio |
| PRDPOD525A | Implement facilities management plan |
| PRDPOD526A | Implement facilities procurement systems |
| PRDPOD527A | Coordinate facilities construction/renovation |

PRD50605 Diploma of Property (Access Consulting)

Access consultants holding a Diploma of Property (Access Consulting) may also work alone or as part of a team and would also conduct access audits and provide advice on access issues. In addition to providing access advice in relation to the Deemed-to-Satisfy provisions of building legislation, access consultants holding a Diploma of Property (Access Consulting) would typically be required to assess performance-based solutions for the provision of access and provide this advice to a broad range of clients, including building certifiers.

To achieve recognition at Diploma level, the candidate must demonstrate competency in 24 units:

- all 17 specified core units (incorporating 10 of the core units from the Certificate IV in Property (Access Consulting), plus
- 7 elective units.

| Core units | |
|-----------------------|--|
| BCGSV5003A | Produce working drawings for residential buildings |
| BCGSV5004A | Apply legislation to urban development and building controls |
| BSBMED201A | Use basic medical terminology |
| CHCCS405A | Work effectively with culturally diverse clients and co-workers |
| PRDAC401A | Apply disability awareness to assessing access situations |
| PRDAC404A | Communicate effectively as an access consultant |
| PRDAC415A | Contribute to team effectiveness |
| PRDAC417A | Follow site occupational health and safety requirements |
| PRDAC418A | Manage risk |
| PRDAC419A | Prepare access reports |
| PRDAC425A | Work effectively as an access consultant |
| PRDAC502A | Apply anthropometric principles to accessible building design and fitout |
| PRDAC503A | Apply building codes and standards to accessible large-scale buildings |
| PRDAC505A | Apply ergonomic principles to accessible building design and fitout |
| PRDAC506A | Apply mechanics of human body functions to accessible building design and fitout |
| PRDAC520A | Undertake research on access issues |
| PSPREG402C | Promote client compliance |
| Elective units | |
| PRDAC501A | Assess documentation of building work for access and conduct inspections during the building process |

| | |
|------------|--|
| PRDAC504A | Apply building control legislation to assessing large-scale buildings for access |
| PRDAC507A | Assess the construction of existing buildings and new building work required to be accessible |
| PRDAC508A | Coordinate policy development |
| PRDAC509A | Develop and evaluate public education programs |
| PRDAC510A | Evaluate materials for the construction of buildings for access |
| PRDAC511A | Provide access advice on the design of the built environment |
| PRDAC512A | Prepare a concept design for accessible building work |
| PRDAC513A | Prepare a design brief for accessible building work |
| PRDAC514A | Prepare and administer tender documentation for accessible building work |
| PRDAC515A | Prepare contract documentation for accessible building work |
| PRDAC516A | Prepare specification documentation for accessible building work |
| PRDAC517A | Provide expert access advice on renovations to private dwellings |
| PRDAC518A | Provide expert access advice on building renovations |
| PRDAC519A | Provide expert access advice to a complainant or respondent |
| PRDAC601A | Participate as an access expert on an Access Panel |
| PRDAC602A | Apply performance-based codes and risk management principles to assessing buildings for access |
| PRDAC603A | Apply unjustifiable hardship principles to Alternative Building Solutions for access |
| BCGSV5010A | Interact with clients in a regulated environment |
| BCGSV6009A | Implement performance based codes and risk management principles for buildings up to 3 storeys |
| BCGSV6011A | Apply legal procedures to building surveying |
| BCGSV6013A | Co-ordinate asset refurbishment |
| BSBHR504A | Manage industrial relations policies and processes |
| LMFFT4010A | Identify and calculate production costs |
| PRDPOD522A | Coordinate facilities and amenities for property users |
| PRDPOD523A | Advise on facilities use and design |
| PRDPOD524A | Monitor performance of property/facility portfolio |
| PRDPOD525A | Implement facilities management plan |

| | |
|------------|---|
| PRDPOD526A | Coordinate facilities procurement system |
| PRDPOD527A | Coordinate facilities construction/renovation |

PRD60301 Advanced Diploma of Spatial Information Services

To achieve the Advanced Diploma, the candidate for recognition must have demonstrated competency in the following:

- all the required 15 units for the Diploma of Spatial Information Services, and
- the 10 core units, plus 3 elective units (total of 13 units) from the Advanced Diploma package.

| Core units | |
|-----------------------|---|
| PRDSIS01A | Determine client requirements |
| PRDSIS02A | Design a project plan |
| PRDSIS05A | Determine suitable sources of information for the creation of new spatial data sets |
| PRDSIS09A | Develop and maintain contractual relationships |
| PRDSIS20A | Design project deliverables |
| PRDSIS21A | Finalise and present project deliverables to the client |
| PRDSIS25A | Lead and supervise teams |
| PRDSIS27A | Maintain client relations |
| PRSIR31A | Undertake process improvement to reduce costs and improve quality service |
| PRSIR35A | Monitor and review staff performance |
| Elective units | |
| PRDSIS13A | Design a spatial data storage system |
| PRDSIS23A | Undertake research and development |
| PRSIR24A | Implement and monitor financial and administration systems |
| PRSIR25A | Develop and implement a business plan |
| PRSIR27A | Prepare budgets |
| PRSIR29A | Establish and implement a marketing strategy |
| PRSIR37A | Develop and implement a human resource plan |

PRD60504 Advanced Diploma of Property, Asset and Facility Management

To achieve recognition at the Advanced Diploma level, the candidate for recognition must demonstrate competency in 16 units:

- 8 of the specified common elective units, plus
- 8 of the specialist elective units.

Two of the common elective units may be chosen from any other endorsed Training Package at AQF level 6.

Two of the specialist elective units may be chosen from any other endorsed Training Package at AQF level 6. The elective units must contribute to a valid, industry supported vocational outcome.

| Common elective units (complete 8) | |
|---|---|
| BSBMGT601A | Contribute to strategic direction |
| BSBMGT602A | Contribute to the development and implementation of strategic plans |
| BSBMGT603A | Review and develop business plans |
| BSBMGT604A | Manage business operations |
| BSBMGT605A | Provide leadership across the organisation |
| BSGMGT606A | Manage customer focus |
| BSBMGT607A | Manage knowledge and information |
| BSBMGT608A | Manage innovation and continuous improvement |
| BSBMGT609A | Manage risk |
| BSBMGT610A | Management environmental management systems |
| Specialist elective units (complete 8 from any of the 2 areas) | |
| Facilities and Asset Management | |
| PRDPOD601A | Prepare project design brief and documentation |
| PRDPOD602A | Develop strategic facilities management plan |
| PRDPOD603A | Manage facilities portfolio |
| PRDPOD604A | Develop lifecycle asset management plan |
| PRDPOD605A | Determine performance of assets and facilities |
| PRDPOD606A | Develop facilities procurement systems |
| Investment | |
| PRDPOD607A | Assess viability of regeneration options |
| PRDPOD608A | Develop a property investment strategy |

| | |
|------------|---|
| PRDPOD609A | Contract to invest in property |
| PRDPOD610A | Plan property portfolio management |
| PRDPOD611A | Manage performance of property investment |
| PRDPOD612A | Negotiate partnership arrangements |
| PRDPOD613A | Conduct a property investment feasibility study |

Assessment Guidelines

Introduction

These Assessment Guidelines provide the endorsed framework for assessment of units of competency in this Training Package. They are designed to ensure that assessment is consistent with the Australian Quality Training Framework (AQTF) *Standards for Registered Training Organisations*. Assessments against the units of competency in this Training Package must be carried out in accordance with these Assessment Guidelines.

Assessment System Overview

This section provides an overview of the requirements for assessment when using this Training Package, including a summary of the AQTF requirements; licensing/registration requirements; and assessment pathways.

Benchmarks for Assessment

Assessment within the National Training Framework is the process of collecting evidence and making judgements about whether competency has been achieved to confirm whether an individual can perform to the standards expected in the workplace, as expressed in the relevant endorsed unit of competency.

In the areas of work covered by this Training Package, the endorsed units of competency are the benchmarks for assessment. As such, they provide the basis for nationally recognised Australian Qualifications Framework (AQF) qualifications and Statements of Attainment issued by Registered Training Organisations (RTOs).

Australian Quality Training Framework Assessment Requirements

Assessment leading to nationally recognised AQF qualifications and Statements of Attainment in the vocational education and training sector must meet the requirements of the AQTF as expressed in the *Standards for Registered Training Organisations*.

The *Standards for Registered Training Organisations* can be downloaded from the DEST website at www.dest.gov.au or can be obtained in hard copy from DEST. The following points summarise the assessment requirements under the AQTF.

Registration of Training Organisations

Assessment must be conducted by, or on behalf of, an RTO formally registered by a State or Territory Registering/Course Accrediting Body in accordance with the *Standards for Registered Training Organisations*. The RTO must have the specific units of competency and/or AQF qualifications on its scope of registration. See Section 1 of the *Standards for Registered Training Organisations*.

Quality Training and Assessment

Each RTO must have systems in place to plan for and provide quality training and assessment across all its operations. See Standard 1 of the *Standards for Registered Training Organisations*.

Assessor Competency Requirements

Each person involved in training, assessment or client service must be competent for the functions they perform. See Standard 7 of the *Standards for Registered Training Organisations* for assessor competency requirements. Standard 7 also specifies the competencies that must be held by trainers.

Assessment Requirements

The RTO's assessments must meet the requirements of the endorsed components of Training Packages within its scope of registration. See Standard 8 of the *Standards for Registered Training Organisations*.

Assessment Strategies

Each RTO must identify, negotiate, plan and implement appropriate learning and assessment strategies to meet the needs of each of its clients. See Standard 9 of the *Standards for Registered Training Organisations*.

Mutual Recognition

Each RTO must recognise the AQF qualifications and Statements of Attainment issued by any other RTO. See Standard 5 of the *Standards for Registered Training Organisations*.

Access and Equity and Client Services

Each RTO must apply access and equity principles, provide timely and appropriate information, advice and support services that assist clients to identify and achieve desired outcomes. This may include reasonable adjustment in assessment. See Standard 6 of the *Standards for Registered Training Organisations*.

Partnership Arrangements

RTOs must have, and comply with, written agreements with each organisation providing training and/or assessment on its behalf. See Standard 1.6 of *Standards for Registered Training Organisations*.

Recording Assessment Outcomes

Each RTO must have effective administration and records management procedures in place, and must record AQF qualifications and Statements of Attainment issued. See Standards 4 and 10.2 of the *Standards for Registered Training*.

Issuing AQF Qualifications and Statement of Attainment

Each RTO must issue AQF qualifications and Statements of Attainment that meet the requirements of the *AQF Implementation Handbook* and the endorsed Training Packages within the scope of its registration. An AQF qualification is issued once the full requirements for a qualification, as specified in the nationally endorsed Training Package are met. A Statement of Attainment is issued where the individual is assessed as competent against fewer units of competency than required for an AQF qualification. See Standard 10 and Section 2 of the *Standards for Registered Training Organisations*.

Licensing/registration requirements

This section provides information on licensing/registration requirements for this Training Package, with the following important disclaimer.

Licensing and registration requirements that apply to specific industries, and vocational education and training, vary between each State and Territory, and can regularly change. The developers of this Training Package, and ANTA, consider that the licensing/registration requirements described in this section apply to RTOs, assessors or candidates with respect to this Training Package. While reasonable care has been taken in its preparation, the developers of this Training Package and ANTA cannot guarantee that the list is definitive or accurate at the time of reading; the information in this section is provided in good faith on that basis.

The Australian property industry licensing/regulatory environment is administered currently by departments, boards or offices in the eight States/Territories. Generally, across all Australian jurisdictions persons seeking to conduct business in the property industry must meet the requirements

of, and gain, a 'real estate licence' to operate.

| | |
|--------------------|---|
| ACT | Agents Board of the ACT PO Box 960 CIVIC SQUARE ACT 2608 Phone (02) 6205 0603 www.fairtrading.act.gov.au Link to Agents Board from this URL |
| New South Wales | NSW Department of Fair Trading 1 Fitzwilliam Street PARRAMATTA NSW 2150 Phone (02) 9619 8733 www.fairtrading.nsw.gov.au |
| Northern Territory | Agents Licensing Board GPO Box 4160 DARWIN NT 0801 Phone (08) 8999 6962 www.nt.gov.au |
| Queensland | Office of Fair Trading Client Services Branch GPO Box 3111 BRISBANE QLD 4001 Phone (07) 3245 1523 www.fairtrading.qld.gov.au |
| South Australia | Office of Consumer & Business Affairs Business and Occupational Services GPO Box 1719 ADELAIDE SA 5001 Phone (08) 8204 9686 www.ocba.sa.gov.au |
| Tasmania | Auctioneers' & Real Estate Agents' Council of Tasmania 2 Davey Street HOBART TAS 7000 Phone (03) 6234 2700 www.thecouncil.com.au |
| Victoria | Business Licensing Authority 452 Flinders Street MELBOURNE VIC 3000 Phone (03) 9627 7299 www.bla.vic.gov.au |
| Western Australia | Real Estate Agents & Business Agents Supervisory Board 219 St Georges Terrace PERTH WA 6000 |

| |
|---|
| Phone (08) 9282 0871 www.reba.wa.gov.au |
|---|

Real Estate and Stock and Station Agency

In order to conduct assessment for statutory licensing or other industry registration requirements, assessors may have to meet additional requirements. Similarly, selected units of competency and qualifications in this Training Package have been identified as forming a basis for a range of statutory licensing and registration systems. Currently, however, licensing requirements in the property services industry (Real Estate and Stock and Station Agency sectors) vary across jurisdictions.

RTOs and candidates should contact the relevant licensing body in their State/Territory for specific advice in relation to Real Estate and Stock and Station Agents licence requirements. Please refer to the table above following for contact details across jurisdictions.

Spatial Information Services

Licensing and regulatory arrangements do not affect the Spatial Information Services vocational qualifications. There are some State/Territory variations in the licensing requirements for some vocations that fall under the banner of Spatial Information Services but licensing applies at a higher level than the qualifications offered by this Training Package.

Business Broking

Persons seeking to conduct business sales transactions must meet the requirements of, and gain, a 'licence' to operate. In the development of the Business Broking competency standards care has been taken to identify aspects of competence required in the area of business sales by licensing authorities. The development of the Business Broking standards may lead to opportunities for mutual recognition and national consistency in the area of licensing. The proposed qualifications may provide a base for portability of registration across jurisdictions. Flexible use of required electives may assist where there are different requirements. Business Broking units of competency may also be appropriate for Continuing Professional Development (CPD) purposes.

Candidates should contact the relevant licensing body in their State/Territory for specific advice in relation to Real Estate and/or Business Broking licence requirements in their State/Territory (refer table at the beginning of this section for details).

Property Operations and Development

In the development of the Property Operations and Development competency standards care has been taken to identify aspects of competency required by licensing authorities. The development of the Property Operations and Development competency standards may lead to opportunities for mutual recognition and national consistency in the area of licensing. The proposed qualifications may provide a base for portability of registration across jurisdictions. Flexible use of required electives may assist where there are different requirements. The Property Operations and Development units of competency may also be appropriate for Continuing Professional Development (CPD) purposes.

Candidates should contact the relevant licensing body for specific advice in relation to licence requirements in their State or Territory (refer table at the beginning of this section for details).

Access Consulting

The developers of this Training Package consider that no licensing or registration requirements apply to RTOs, assessors or candidates with respect to the Access Consulting sector of this Training Package. However, a number of state and territory building regulatory authorities may decide to introduce licensing or registration requirements for access consultants upon the introduction of the Disability Discrimination Act Premises Standard if they are providing advice on access issues in relation to buildings. Contact the relevant state or territory department(s) to check if there are any licensing or

registration requirements with which you must comply.

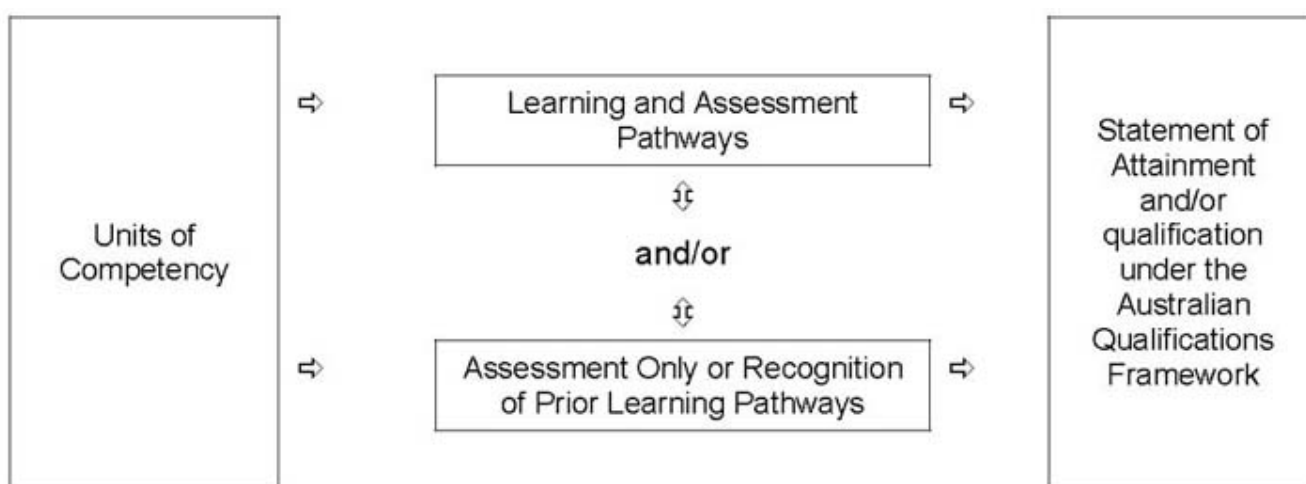
Issues concerning the anticipated impact of regulatory requirements have been integrated into the performance criteria of the relevant units and must be reflected in the assessment process.

Pathways

The competencies in this Training Package may be attained in a number of ways including through:

- formal or informal education and training
- experiences in the workplace
- general life experience, and/or
- any combination of the above.

Assessment under this Training Package leading to an AQF qualification or Statement of Attainment may follow a learning and assessment pathway, an assessment-only or recognition pathway, or a combination of the two as illustrated in the following diagram.



Each of these assessment pathways leads to full recognition of competencies held - the critical issue is that the candidate is competent, not how the competency was acquired.

Assessment, by any pathway, must comply with the assessment requirements set out in the *Standards for Registered Training Organisations*.

Learning and Assessment Pathways

Usually, learning and assessment are integrated, with assessment evidence being collected and feedback provided to the candidate at anytime throughout the learning and assessment process.

Learning and assessment pathways may include structured programs in a variety of contexts using a range of strategies to meet different learner needs. Structured learning and assessment programs could be: group-based, work-based, project-based, self-paced, action learning-based; conducted by distance or e-learning; and/or involve practice and experience in the workplace.

Learning and assessment pathways to suit New Apprenticeships have a mix of formal structured training and structured workplace experience with formative assessment activities through which candidates can acquire and demonstrate skills and knowledge from the relevant units of competency.

Assessment-Only or Recognition of Prior Learning Pathway

Competencies already held by individuals can be formally assessed against the units of competency in this Training Package, and should be recognised regardless of how, when or where they were achieved.

In an assessment-only or Recognition of Prior Learning (RPL) pathway, the candidate provides current, quality evidence of their competency against the relevant unit of competency. This process may be directed by the candidate and verified by the assessor, such as in the compilation of portfolios; or directed by the assessor, such as through observation of workplace performance and skills application, and oral and/or written assessment. Where the outcomes of this process indicate that the candidate is competent, structured training is not required. The RPL requirements of Standard 8.2 of the *Standards for Registered Training Organisations* must be met.

As with all assessment, the assessor must be confident that the evidence indicates that the candidate is currently competent against the endorsed unit of competency. This evidence may take a variety of forms and might include certification, references from past employers, testimonials from clients, and work samples. The onus is on candidates to provide sufficient evidence to satisfy assessors that they currently hold the relevant competencies. In judging evidence, the assessor must ensure that the evidence of prior learning is:

- authentic (the candidate's own work)
- valid (directly related to the current version of the relevant endorsed unit of competency)
- reliable (shows that the candidate consistently meets the endorsed unit of competency)
- current (reflects the candidate's current capacity to perform the aspect of the work covered by the endorsed unit of competency), and
- sufficient (covers the full range of elements in the relevant unit of competency and addresses the four dimensions of competency, namely task skills, task management skills, contingency management skills, and job/role environment skills).

The assessment only or recognition of prior learning pathway is likely to be most appropriate in the following scenarios:

- candidates enrolling in qualifications who want recognition for prior learning or current competencies
- existing workers
- individuals with overseas qualifications
- recent migrants with established work histories
- people returning to the workplace, and
- people with disabilities or injuries requiring a change in career.

Combination of Pathways

Where candidates for assessment have gained competencies through work and life experience and gaps in their competence are identified, or where they require training in new areas, a combination of pathways may be appropriate.

In such situations, the candidate may undertake an initial assessment to determine their current competency. Once current competency is identified, a structured learning and assessment program ensures that the candidate acquires the required additional competencies identified as gaps.

Assessor Requirements

This section identifies the mandatory competencies for assessors, and clarifies how others may contribute to the assessment process where one person alone does not hold all the required competencies.

Assessor Competencies

The *Standards for Registered Training Organisations* specify mandatory competency requirements for assessors. For information, Standard 7.3 from the *Standards for Registered Training Organisations* follows:

- 7.3 a The RTO must ensure that assessments are conducted by a person who has:
- i the following competencies¹ from the Training Package for Assessment and Workplace Training, or demonstrated equivalent competencies:
 - a TAAASS401A Plan and organise assessment;
 - b TAAASS402A Assess competence;
 - c TAAASS404A Participate in assessment validation;
 - ii relevant vocational competencies, at least to the level being assessed.
- b However, if a person does not have all of the competencies in Standards 7.3 a (i) and the vocational competencies as defined in 7.3 a (ii), one person with the competencies listed in Standard 7.3 a (i), and one or more persons who have the competencies listed in Standard 7.3 a (ii) may work together to conduct assessments.

¹ A person who holds the competencies BSZ401A Plan assessment, BSZ402A Conduct assessment, and BSZ403A Review assessment from the Training Package for Assessment and Workplace Training will be accepted for the purposes of this standard. A person who has demonstrated equivalent competencies to BSZ401A and BSZ402A and BSZ403A in the period up to 12 months following publication of the Training and Assessment Training Package will also be accepted for the purposes of this standard.

Designing Assessment Tools

This section provides an overview on the use and development of assessment tools.

Use of Assessment Tools

Assessment tools provide a means of collecting the evidence that assessors use in making judgements about whether candidates have achieved competency.

There is no set format or process for the design, production or development of assessment tools. Assessors may use prepared assessment tools, such as those specifically developed to support this Training Package, or they may develop their own.

Using Prepared Assessment Tools

If using prepared assessment tools, assessors should ensure these are benchmarked, or mapped, against the current version of the relevant unit of competency. This can be done by checking that the materials are listed on the National Training Information Service (<http://www.ntis.gov.au>). Materials on the list have been noted by the National Training Quality Council as meeting their quality criteria for Training Package support materials.

Developing Assessment Tools

When developing assessment tools, assessors must ensure that they:

- are benchmarked against the relevant unit or units of competency
- are reviewed as part of the validation of assessment strategies as required under 9.2 (i) of the *Standards for Registered Training Organisations*
- meet the assessment requirements expressed in the *Standards for Registered Training Organisations*, particularly Standards 8 and 9.

A key reference for assessors developing assessment tools is TAA04 Training and Assessment Training Package and the unit of competency TAAASS403A *Develop assessment tools*. There is no set format or process for the design, production or development of assessment materials.

Conducting Assessment

This section details the mandatory assessment requirements and provides information on equity in assessment including reasonable adjustment.

Mandatory Assessment Requirements

Assessments must meet the criteria set out in Standard 8 from the *Standards for Registered Training Organisations*. For information, Standard 8 from the *Standards for Registered Training Organisations* is reproduced below.

8 RTO Assessments

The RTO's assessments meet the requirements of the endorsed components of Training Packages and the outcomes specified in accredited courses within the scope of its registration.

8.1 The RTO must ensure that assessments (including RPL):

- i. comply with the assessment guidelines included in the applicable nationally endorsed Training Packages or the assessment requirements specified in accredited courses;
- ii. lead to the issuing of a statement of attainment or qualification under the AQF when a person is assessed as competent against nationally endorsed unit(s) of competency in the applicable Training Package or modules specified in the applicable accredited course;
- iii. are valid, reliable, fair and flexible;
- iv. provide for applicants to be informed of the context and purpose of the assessment and the assessment process;
- v. where relevant, focus on the application of knowledge and skill to standard of performance required in the workplace and cover all aspects workplace performance, including task skills, task management skills, contingency management skills and job role environment skills;
- vi. involve the evaluation of sufficient evidence to enable judgements to be made about whether competency has been attained;
- vii. provide for feedback to the applicant about the outcomes of the assessment process and guidance on future options in relation to those outcomes;
- viii. are equitable for all persons, taking account of individual needs relevant to the assessment; and
- ix. provide for reassessment on appeal.

8.2 a The RTO must ensure that RPL is offered to all applicants on enrolment

- b The RTO must have an RPL process that:
- i. is structured to minimise the time and cost to applicants; and
 - ii. provides adequate information, support and opportunities for participants to engage in the RPL process.

Access and Equity

An individual's access to the assessment process should not be adversely affected by restrictions placed on the location or context of assessment beyond the requirements specified in this Training Package.

Reasonable adjustments can be made to ensure equity in assessment for people with disabilities. Adjustments include any changes to the assessment process or context that meet the individual needs of the person with a disability, but do not change competency outcomes. Such adjustments are considered 'reasonable' if they do not impose an unjustifiable hardship on a training provider or employer. When assessing people with disabilities, assessors are encouraged to apply good practice assessment methods with sensitivity and flexibility.

Further Sources of Information

The section provides a listing of useful contacts and resources to assist assessors in planning, designing, conducting and reviewing of assessments against this Training Package.

Contacts

Australian Training Products Ltd
Level 25, 150 Lonsdale Street
MELBOURNE VIC 3000
PO Box 12211
A'Beckett Street Post Office
MELBOURNE VIC 8006
Telephone: (03) 9655 0600
Fax: (03) 9639 4684
Web: www.atpl.net.au
Email: sales@atpl.net.au

Innovation and Business Industry Skills Council
Building B, Level 2
192 Burwood Road
HAWTHORN VIC 3122
Telephone: (03) 9815 7000
Fax: (03) 9815 7001
Email: virtual@ibsa.org.au

General Resources

Refer to <http://antapubs.dest.gov.au/publications/search.asp> to locate the following ANTA publications.

AQF Implementation Handbook, third Edition. Australian Qualifications Framework Advisory Board, 2002, aqf.edu.au

Australian Quality Training Framework (AQTF) - for general information go to:
www.dest.gov.au/sectors

Australian Quality Training Framework (AQTF) - for resources and information go to:
www.dest.gov.au

Australian Quality Training Framework *Standards for Registered Training Organisations*, Australian National Training Authority, Melbourne, 2005. Available in hard copy from State and Territory Training Authorities or can be downloaded from www.dest.gov.au

TAA04 Training and Assessment Training Package. This is available from the Innovation and Business Skills Australia (IBSA) Industry Skills Council and can be viewed, and components downloaded, from the National Training Information Service (NTIS). National Training Information Service, an electronic database providing comprehensive information about RTOs, Training Packages and accredited courses – www.ntis.gov.au *Style Guide for Training Package Support Materials*, Australian National Training Authority, Melbourne, 2003. Can be downloaded from the ANTA page at www.dest.gov.au

Assessment Resources

Training Package Assessment Guides - a range of resources to assist RTOs in developing Training Package assessment materials developed by DEST with funding from the Department of Education, Training and Youth Affairs. It is made up of 10 separate titles, as described at the ANTA publications page of www.dest.gov.au. Go to www.resourcegenerator.gov.au/loadpage.asp?TPAG.htm

Printed and/or CD ROM versions of the Guides can be purchased from Australian Training Products

(ATP). The resource includes the following guides:

- 1 Training Package Assessment Materials Kit
- 2 Assessing Competencies in Higher Qualifications
- 3 Recognition Resource
- 4 Kit to Support Assessor Training
- 5 Candidate's Kit: Guide to Assessment in New Apprenticeships
- 6 Assessment Approaches for Small Workplaces
- 7 Assessment Using Partnership Arrangements
- 8 Strategies for ensuring Consistency in Assessment
- 9 Networking for Assessors
- 10 Quality Assurance Guide for Assessment

An additional guide "Delivery and Assessment Strategies" has been developed to complement these resources.

Assessment Tool Design and Conducting Assessment

VETASSESS & Western Australian Department of Training and Employment 2000, *Designing Tests - Guidelines for designing knowledge based tests for Training Packages*. Vocational Education and Assessment Centre 1997, *Designing Workplace Assessment Tools, A self-directed learning program*, NSW TAFE.

Manufacturing Learning Australia 2000, *Assessment Solutions*, Australian Training Products, Melbourne.

Rumsey, David 1994, *Assessment practical guide*, Australian Government Publishing Service, Canberra.

Assessor Training

Australian Committee on Training Curriculum (ACTRAC) 1994, *Assessor training program - learning materials*, Australian Training Products, Melbourne.

Australian National Training Authority, *A Guide for Professional Development*, ANTA, Brisbane.

Australian Training Products Ltd *Assessment and Workplace Training, Training Package - Toolbox*, ATPL Melbourne.

Green, M, et al. 1997, *Key competencies professional development Package*, Department for Education and Children's Services, South Australia.

Victorian TAFE Association 2000, *The professional development CD: A learning tool*, VTA, Melbourne.

Assessment System Design and Management

Office of Training and Further Education 1998, *Demonstrating best practice in VET project - assessment systems and processes*, OTFE Victoria.

Toop, L., Gibb, J. & Worsnop, P. *Assessment system designs*, Australian Government Publishing Service, Canberra.

Western Australia Department of Training and VETASSESS 1998, *Kit for Skills Recognition Organisations*, WADOT, Perth.

Competency Standards

What is competency?

The broad concept of industry competency concerns the ability to perform particular tasks and duties to the standard of performance expected in the workplace. Competency requires the application of specified skills, knowledge and attitudes relevant to effective participation in an industry, industry sector or enterprise.

Competency covers all aspects of workplace performance and involves performing individual tasks; managing a range of different tasks; responding to contingencies or breakdowns; and, dealing with the responsibilities of the workplace, including working with others. Workplace competency requires the ability to apply relevant skills, knowledge and attitudes consistently over time and in the required workplace situations and environments. In line with this concept of competency Training Packages focus on what is expected of a competent individual in the workplace as an outcome of learning, rather than focussing on the learning process itself.

Competency standards in Training Packages are determined by industry to meet identified industry skill needs. Competency standards are made up of a number of units of competency each of which describes a key function or role in a particular job function or occupation. Each unit of competency within a Training Package is linked to one or more AQF qualifications.

Contextualisation of Units of Competency by RTOs

Registered Training Organisation (RTOs) may contextualise units of competency to reflect local outcomes required. Contextualisation could involve additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, specific enterprise equipment requirements, or to otherwise meet local needs. However, the integrity of the overall intended outcome of the unit of competency must be maintained.

Any contextualisation of units of competency in this endorsed Training Package must be within the bounds of the following advice. In contextualising units of competency, RTOs:

- must not remove or add to the number and content of elements and performance criteria
- may add specific industry terminology to performance criteria where this does not distort or narrow the competency outcomes
- may make amendments and additions to the range statement as long as such changes do not diminish the breadth of application of the competency and reduce its portability, and/or
- may add detail to the evidence guide in areas such as the critical aspects of evidence or resources and infrastructure required where these expand the breadth of the competency but do not limit its use.

Components of Units of Competency

The components of units of competency are summarised below, in the order in which they appear in each unit of competency.

Unit Title

The unit title is a succinct statement of the outcome of the unit of competency. Each unit of competency title is unique, both within and across Training Packages.

Unit Descriptor

The unit descriptor broadly communicates the content of the unit of competency and the skill area it addresses. Where units of competency have been contextualised from units of competency from other endorsed Training Packages, summary information is provided. There may also be a brief second paragraph that describes its relationship with other units of competency, and any licensing

requirements.

Prerequisite Units (optional)

If there are any units of competency that must be completed before the unit, these will be listed.

Application of the Unit

This sub-section fleshes out the unit of competency's scope, purpose and operation in different contexts, for example, by showing how it applies in the workplace.

Competency Field (Optional)

The competency field either reflects the way the units of competency are categorised in the Training Package or denotes the industry sector, specialisation or function. It is an optional component of the unit of competency.

Sector (optional)

The industry sector is a further categorisation of the competency field and identifies the next classification, for example an elective or supervision field.

Elements of Competency

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

Performance Criteria

The performance criteria specify the required performance in relevant tasks, roles, skills and in the applied knowledge that enables competent performance. They are usually written in passive voice. Critical terms or phrases may be written in bold italics and then defined in range statement, in the order of their appearance in the performance criteria.

Required Skills and Knowledge

The essential skills and knowledge are either identified separately or combined. Knowledge identifies what a person needs to know to perform the work in an informed and effective manner. Skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.

Key Competencies

The way the Key Competencies relate to the unit will be described (unless the developer has described them at the level of the qualification). The Key Competencies are described in more detail at the end of this section.

Range Statement

The range statement provides a context for the unit of competency, describing 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. As applicable, the meanings of key terms used in the performance criteria will also be explained in the range statement.

Evidence Guide

The evidence guide is critical in assessment as it provides information to the Registered Training Organisation (RTO) and assessor about how the described competency may be demonstrated. The evidence guide does this by providing a range of evidence for the assessor to make determinations, and by providing the assessment context. The evidence guide describes:

- conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- relationships with the assessment of any other units of competency
- suitable methodologies for conducting assessment including the potential for workplace simulation
- resource implications, for example access to particular equipment, infrastructure or situations
- how consistency in performance can be assessed over time, various contexts and with a range of evidence, and
- the required underpinning knowledge and skills

Key Competencies

All Training Packages require the integration of Key Competencies either in each unit of competency, or across a qualification, depending on industry needs and preferences.

The Key Competencies were first defined in 1992 in the project report, *Putting General Education to Work: The Key Competencies Report* (Mayer Committee 1992). The skills and knowledge they describe are essential for effective workplace participation and involve the sorts of capabilities commonly used by employers as selection criteria. They underpin the ability of employees to adapt to technological, organisational, societal and functional change.

The Key Competencies are generic, in that they apply to work in general, rather than to particular occupations or industries. They focus on the application of knowledge and skills in an integrated way in workplace situations. The seven Key Competencies are:

1 Communicating ideas and information

The capacity to communicate effectively with others using the range of spoken, written, graphic and other non-verbal means of expression.

2 Collecting, analysing and organising information

The capacity to locate, sift and sort information in order to select what is required and to present it in a useful way, and evaluate both the information itself and the sources and methods used to collect it.

3 Planning and organising activities

The capacity to plan and organise one's own work activities, including making good use of time and resources, sorting out priorities and monitoring one's performance.

4 Working with others in teams

The capacity to interact effectively with other people both on a one-to-one basis and in groups, including understanding and responding to the needs of a client and working effectively as a member of a team to achieve a shared goal.

5 Using mathematical ideas and techniques

The capacity to use mathematical ideas, such as number and space, and techniques such as estimation and approximation, for practical purposes.

6 Solving problems

The capacity to apply problem-solving strategies in purposeful ways, both in situations where the problem and the solution are clearly evident and in situations requiring creative thinking and a creative approach to achieve a desired outcome.

7 Using technology

The capacity to apply technology, combining the physical and sensory skills needed to operate

equipment with the understanding of scientific and technological principles needed to explore and adapt systems.

Performance Levels

There are three levels of performance defined within the Key Competencies. These are stand-alone levels and do not correspond to the AQF qualification levels.

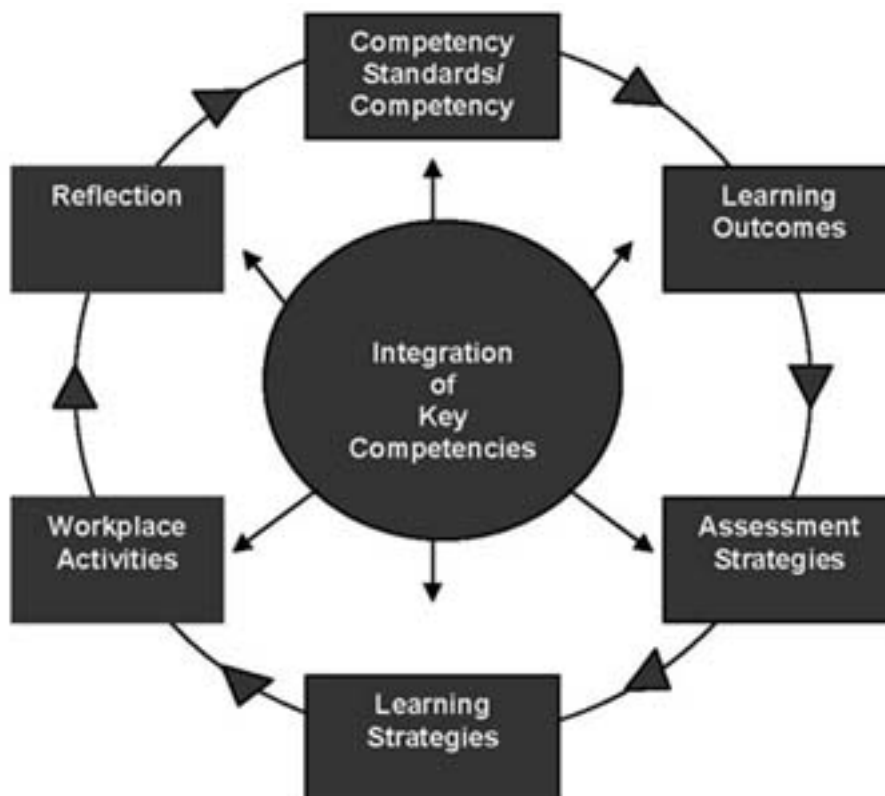
- **Performance Level 1** is concerned with the level of competence needed to *undertake* activities efficiently with sufficient self-management to meet the explicit requirements of the activity, and to make judgements about the quality of outcomes against established criteria.
- **Performance Level 2** describes the competence needed to *manage* activities requiring the selection, application and integration of a number of elements, and to select from established criteria to judge quality of process and outcome.
- **Performance Level 3** describes the competence needed to *evaluate and reshape* processes, to establish and use principles in order to determine appropriate ways of approaching activities, and to establish criteria for judging quality of process and outcome.

However, relating performance to the specific industry or workplace context may be more useful than interpreting the somewhat abstracted performance levels provided above. Where the Key Competencies are defined in the unit of competency, you will find them in a table, together with examples of their application, to help with assessment of their performance.

Also, in evaluating the level of performance for the Key Competencies, consider the performance expectations at the AQF qualification level involved.

Delivery and Assessment of Key Competencies

The Key Competencies are integral to workplace competency, and, as such must be explicitly considered in the design, customisation, delivery and assessment of vocational education and training programs as represented diagrammatically below.



Qualification Customisation Within and Outside the Training Package

Customisation allows for the capacity to substitute units of competency from other Training Packages where there is consistency in outcomes.

Any customisation must ensure the integrity of:

- endorsed national competency standards or other standards forming the basis of accredited courses
- AQF qualifications, and
- industry skill and portability requirements

Customisation may occur in the following circumstances.

- Regulators prescribe competencies from other Training Packages.
- A demand for traineeships in areas not yet covered by the standards in this Package arises.
- There is a demand by regulators for prescribed training at an AQF level not covered by the standards.
- A unit in another Training Package better expresses the content of a work function covered by a unit in one of the standards in this Package. In this case, the second unit delivers the same outcomes, but the language used may be better understood (customised) in terms of the candidate's work environment.
- A candidate's range of work functions includes all core functions in this industry, but also includes specialist functions performed in other industries, but not included in this Package.
- Generally, the work described in the unit is performed in an allied industry context, for example project management in the building industry. The variable is the location in which work is performed rather than the nature of the work or the performance criteria which have to be demonstrated.

In each case, the situation can be addressed by combining units of competency in this Package with units of competency in other endorsed industry Packages. If the recombined units deliver the same outcome, the qualification level stays the same, but the package of units within the qualification may be different from the original packaging advice.

To ensure quality outcomes and avoid duplication of training/assessment effort, customisation of any qualification is governed by the following criteria:

- each unit delivers a workplace outcome within a coherent industry recognition framework
- the combination of unit outcomes provides the basis for a qualification at a prescribed level of the AQF
- the purpose of the customisation is to provide training which is tailored to the needs of a specific workplace

Therefore:

- core units may not be replaced or substituted
- elective units in any package of units may be replaced or substituted by other units of competency but only where equivalence of outcome has been established between relevant ITABs
- only elective units which are not required for purposes of occupational/functional regulation in the industry may be replaced
- only a unit which delivers an outcome in the qualification structure equivalent to the elective unit which it replaces may be used as a replacement unit
- the replacement unit must not restrict the candidate's access to further education or employment opportunities in this industry
- training modules may not be substituted for endorsed units of competency

All other variables can be managed through customised training. There is no restriction on the use by other industries and enterprises of individual units (either core or elective) in endorsed standards

covered by this Package.

PRDPOD62A**Clarify and confirm property information requirements****Unit Descriptor**

This unit covers advice to clients on the market and/or on specific property.

Unit Sector

Property operations and development

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Discuss and clarify requirements | <ul style="list-style-type: none"> 1.1 The nature and scope of the enquiry is clarified to the satisfaction of both parties 1.2 Any additional information required is identified, and arrangements clarified and confirmed 1.3 The capability of the organisation in the area under discussion is established, and any potential conflicts of interest are clarified |
| 2. Confirm processes for providing information | <ul style="list-style-type: none"> 2.1 Information is provided according to organisational policy and service provision guidelines 2.2 Potential legal complications and professional indemnity issues involved in the provision of the required information are identified and addressed to the satisfaction of both parties 2.3 Processes and terms under which the information might be provided are negotiated, and agreement reached to the satisfaction of relevant parties |
| 3. Prepare and provide information | <ul style="list-style-type: none"> 3.1 Information collected satisfies agreed requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT**Type of enquiry**

may include information about leases and leasing, company services, property operations, facilities management, investment opportunities, property marketing policy or management procedures, current and planned property developments, property sales and property marketing services.

| | |
|---|---|
| Category of person making the enquiry | may be a financial institution, property owner(s), local, State or federal government agency, individuals, a member of the public or a person with whom the organisation has a legal contractual arrangement. |
| Known solutions | information offered to people making enquiries may be selected from a routine range of information solutions or may require innovative and novel responses, based on prior experience, knowledge of current conditions or research into new situations. |
| Levels of authority and responsibility | The information may be provided as part of general information about services or products on offer to the public, or as part of the internal processes and procedures of the company. |
| The authority to provide the information | will be defined by levels of delegated responsibility within the management structure of the organisation. |
| Information management systems | used to record and track enquiries may be either electronic or print-based. |
| Sources of information | may involve professional opinions from outside sources, including building and construction professionals, real estate agents, lawyers, and financial advisers. |

EVIDENCE GUIDE

| | |
|---|---|
| Context of assessment | <p>Assessment should determine the extent to which the candidate is able to perform to the standard required in the workplace. Information obtained from the workplace or actual work experience should be treated as commercial-in-confidence.</p> <p>Evidence of competency may be derived from:</p> <ul style="list-style-type: none"> • documentation of information provided to at least two different categories of client with different information needs • discussions which clarify the underlying principles and processes used to provide the information • discussions involving some level of prediction about the uses to which the information provided might be used • clarification of the risks and benefits involved in providing information to the level required by the client and agreed to by the organisation |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to documentation, including any relevant correspondence • access to relevant information management hardware and software • access to a suitable venue |

Underpinning knowledge

- General knowledge of prevailing property market conditions
- Operational structures, services and products
- Principles of business and property law which apply in the area under discussion
- Applied research methods
- Sources of information and assistance
- Organisational policies and procedures in the area under discussion

Underpinning skills

- Communication, including interpersonal negotiation and selling techniques
- Work planning and organisation
- Fee determination in relation to property information requirements
- Problem-solving and risk management in relation to property information requirements
- Finding and using property information
- Exercising judgment in relation to property information requirements
- Literacy

PRDRE01A**Develop a strategic business plan****Unit Descriptor**

This unit covers development of a business strategy to successfully position the real estate agency in the property market.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Identify business opportunities in the property market | 1.1 Valid and reliable sources of information concerning the property market and business environment are identified 1.2 Information relevant to real estate business planning is collated 1.3 Immediate and ongoing business opportunities are identified and confirmed from an analysis of the business environment 1.4 Viable opportunities are identified by cost benefit analysis, based on available property market information |
| 2. Establish the potential range and demand for agency services | 2.1 A property market profile applicable to the agency is developed using the information available 2.2 An estimate of the demand for agency services, and a potential client profile, is accurately developed and assessed 2.3 Resources required to service the projected demand are correctly identified and included in an overall cost benefit analysis 2.4 Agency marketing positioning strategy is identified and adopted 2.5 Lists of the appropriate range of services are provided and associated service fees and charges are prepared |
| 3. Establish achievable business goals and objectives | 3.1 Activities related to business goals are identified to achieve an increase in the firm's share of the property market 3.2 Required rates of return are accurately estimated for short and long-term agency viability and to ensure cash flow management |
| 4. Document and review agency business strategies | 4.1 Plans are documented to provide an accessible reference tool for evaluations of agency business performance 4.2 Strategic directions are developed within the plans that are assessable against performance benchmarks over time |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---------------------------------------|--|
| The legal status of the agency | <p>is the legal structure under which the agency operates, for example:</p> <ul style="list-style-type: none">• sole trader, partnership, registered business, franchise, body corporate/company• 'agency' within the meaning of the relevant property act and associated licensing requirements• 'agency' within any of the legal jurisdictions operating in Australia and associated laws, including corporations law, statutory law, taxation law, trades practices law, common law duty of care provisions; laws of contract and tort affecting real estate agency agreements, and those services provided for a fee |
| Information | <p>the reliability, validity and availability of which includes:</p> <ul style="list-style-type: none">• information from industry associations, government agencies and educational institutions• research methodologies and techniques used to obtain and analyse data• the quality of analysis and translation of the information into strategic initiatives |
| Geographic location | <p>may include metropolitan, country and international locations.</p> |
| The maturity and size | <p>of the real estate business includes:</p> <ul style="list-style-type: none">• any existing asset base and services provided• privately owned real estate agencies, sole practitioners or partnership arrangements, government departments or sections of local, State or Commonwealth authorities providing real estate services |
| Relevant stakeholders | <p>(those having a financial interest) may include, but are not limited to, co-owners, staff and others to whom a duty of care is owed, and financial institutions with a financial interest in the business.</p> |
| Asset impact | <p>includes, but is not limited to, net worth of the business, goodwill value, cash flow viability and resulting liquidity, return on investment, and capital reserves.</p> |
| Area of business | <p>may include rural, residential, retail, commercial, industrial, property valuation, specialist properties, including property used for tourism, leisure, community, medical and transport activities.</p> |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of an assignment that closely resembles normal work practices for a person with responsibilities identified in the unit.

Evidence of competency should include consideration of the preparation and verbal delivery of a business plan for a defined agency.

Assessment of evidence should also establish the individual's understanding of factors affecting strategic business planning, including:

- research techniques used to obtain data incorporated in a hard-copy document/plan
- explanations demonstrating the ability to obtain, check and use information from a variety of sources
- a demonstrated capacity to obtain and use legal, financial and market information for strategic planning purposes
- the ability to work as a member of a team in devising a strategic plan
- the ability to present strategic planning material and justify decisions made in relation to key strategic directions proposed in the plan

Scope of application

This unit has application in the management of a real estate agency.

Required workplace performance

At the agency principal level, the unit requires the total expression of accountability and responsibility at law, including reasonable responsibility for the work of others in gathering data and work coordination.

Where the competency is required to be performed as part of a general management role, accountability and responsibility will be qualified and dependent on final endorsement by the key stakeholders.

Resources required for assessment include:

- audiovisual equipment where available
- guidelines on strategic business planning
- relevant industry codes of practice
- a suitable venue, either in the workplace or classroom
- a panel of assessors, including the candidate's immediate supervisor or peers, if relevant

Underpinning knowledge

- Working knowledge of the different administrative systems and processes used to evaluate agency business performance
- Strategic planning
- Marketing
- Financial management
- Real estate/property law

Underpinning skills

- Planning, organising and controlling information
- Risk analysis and management
- Costing, estimating and budgeting
- Applied research
- Analysis of business environments and real estate market trends
- Written and verbal presentation

PRDRE02A**Unit Descriptor****Manage agency performance**

This unit covers interpretation of the agency business plan and the setting up of business oriented processes and systems to support the achievement of business goals. Unit PRDRE01A Develop a strategic business plan, will directly influence outcomes of this unit.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Interpret and implement the work-based elements of the agency business plan | 1.1 A business strategy plan is developed to enable interpretation and determination of the processes and resources required to achieve business goals 1.2 An appropriate legal and administrative structure to deliver agency services is developed and agreed to by stakeholders 1.3 Organisational systems and processes to deliver the agency strategy are determined from an assessment of available resources and information 1.4 Information and resources are used to confirm the organisation of business activities and systems required for effective and efficient agency management and service delivery 1.5 Key indicators of business performance are determined from consultation with business advisers and staff and incorporated in work plans 1.6 Key indicators are identified as a basis for individual work plans |
| 2. Establish processes for monitoring business performance | 2.1 Cost-effective processes are established to collect information on key indicators of business performance 2.2 Opportunities for comparing performance with existing and potential competitors are identified and considered as part of the business monitoring process 2.3 Procedures are established to enable the regular analysis of performance, which can then be used to provide comparisons with planned business objectives |
| 3. Review and adjust business performance | 3.1 Information on business performance is systematically collected and measured against agency and industry performance indicators 3.2 Business performance is continuously evaluated to enable identification of areas requiring improvement 3.3 Improved productivity outcomes are addressed through modifications to agency activities and systems |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---|--|
| Commercial environment | may have an effect on the availability of funding and the allocation of resources to specified areas. |
| Type and size of business | may include privately owned real estate agencies, valuation, property management, sole practitioners or partnerships, and franchise operations, as well as government agencies involved in the provision of real estate services. |
| Existing organisational systems and structures | <p>may include administrative, financial, human resources and customer service arrangements already in place, or require the creation of new systems, depending on the maturity of the business. Specifically:</p> <ul style="list-style-type: none"> • the prevailing organisational culture and agency orientation to new and repeat business • availability and quality of information held on customers • availability of industry performance indicators • agency orientation and existence of a property marketing strategy and promotional budget |
| Quality standards | may include practice standards, ISO quality standards, franchise standards or enterprise standards. |
| Access to physical resources | may be constrained by geographic, commercial or cultural factors. |
| Physical resources | may include information, money, facilities, office systems (manual and computerised), telecommunications equipment and human resources. |
| Performance indicators used in property marketing services | may include analysis of sales, turnover ratios, ratio of income to outgoings, number of listings per locality, number of appraisals per locality, percentage of listings obtained from appraisals, and percentage of sales obtained from listings. |

| | |
|---|--|
| Performance indicators in management | may include size of rent roll, ratio of interviews to agency agreements entered into, and successful management of complaints. |
| Legislative and other risk factors | may include occupational health and safety, public liability, professional indemnity, quality assurance, product liability, franchise and licence agreements, and property ownership, including intellectual property. |
| Commercial-in-confidence information | includes any information on the operation of the agency or information about the discrete market niche in which the agency operates that could benefit a competitor. |
| Work plans | may be individually or collectively developed and may cover administration, sales, management or specialised services. |

EVIDENCE GUIDE

| | |
|------------------------------|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business management assignment.</p> <p>Evidence of competency should include consideration of the efficiency of the systems generated and their practical application in the overall management of the agency and could include case studies and explanations for choices about systems.</p> <p>Assessment of evidence should establish the individual's understanding of factors affecting the application and use of business management systems, for example:</p> <ul style="list-style-type: none"> • staff use of information management systems • organisational cultures and performance appraisal systems, and use of visual aids such as organisational charts, agency records, procedures and databases to illustrate the advantages of the system • office plans and work station layouts • inventories and asset registers • operational budgets, including cash flow statements (case study material should be used, rather than commercial-in-confidence information derived from an agency) • the use of work plans and timelines as aids to systems management • confidentiality, security and privacy considerations • company operations manuals <p>The human factors involved could be assessed through role-plays or discussions around critical incidents to illustrate key points.</p> <p>Evidence could also be derived from portfolios of materials.</p> |
| Scope of application | This unit applies to agency management of all sectors of the real estate industry. |

Required workplace performance

The competencies described in the unit may be achieved under limited supervision, within the broad framework established by an agreed strategic plan and budget limitations. Considerable judgement is required to make and act on decisions.

Resources required for assessment include:

- case study material rather than commercial-in-confidence material obtained from an employing agency, should be used in the assessment of this unit
- an appropriate venue and workstation, including audiovisual equipment, computers and appropriate software and agency operational manuals

Underpinning knowledge

- Financial management and control techniques
- The legislative framework impacting on the provision of services in the real estate industry
- Human resource development
- Customer relations
- Business planning
- Professional ethics for real estate
- Quality assurance
- Procedures for establishing and using real estate office equipment and technology

Underpinning skills

- Planning, organising and controlling information to manage agency performance
- Written communication skills, including literacy
- Problem-solving
- Judgment
- Communication, including negotiation, interpersonal and group techniques to manage agency performance
- Research
- Numeracy, including the use of simple statistics

PRDRE03A**Unit Descriptor****Develop and implement client service strategies**

This unit covers establishment of information systems and processes which support the marketing of agency services to the public and to agency clients.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Develop client loyalty strategies | 1.1 Client loyalty strategies are developed which support repeat business 1.2 Services are structured to emphasise client satisfaction and maintain the agency's reputation for service in the marketplace 1.3 Client service strategies are integrated into individual and team delivery of agency services 1.4 Performance indicators are developed that enable policy review and activity adjustment to occur |
| 2. Maintain clear lines of communication | 2.1 Information provided to clients is timely, relevant and up-to-date 2.2 Information on client needs is provided in a manner which improves client relations and the quality of services 2.3 Client service records are maintained to provide an accurate and objective record of communication with clients and other service providers 2.4 Complaints are handled in a manner which improves the agency's reputation for quality service and integrity |
| 3. Review client policy | 3.1 Client satisfaction is surveyed at regular intervals to enable modification or adjustment to client contact and agency marketing activities 3.2 Client feedback on quality of services is obtained which can be used to improve performance in client contact areas 3.3 Reviewed and updated information on agency services is maintained which reflects current client expectations and enables improvement of the agency's image 3.4 Opportunities arising from information provided by clients are used to update the agency marketing strategy |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|---|
| Market research data | may be qualitative or quantitative in nature, including information on potential clients, suppliers and competitors. |
| Opportunities for change and improvement | may relate to size of the agency and existing customer relations policies and strategies. Opportunities could include consideration of products on offer, range of services, availability and cost of producing information, pricing structure, marketing position, and ancillary services. |
| Category of client | may be individuals, corporations, or private or public enterprises. |
| Methods for determining client satisfaction | may be obtained through surveys, informal chats, client meetings, sales to contact ratios, and formal and informal complaints. |

EVIDENCE GUIDE

| | |
|---------------------------------------|---|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of an overall assignment that closely resembles normal work practices, including assessment of competencies in marketing, customer relations and administration.</p> <p>Evidence of competency may be derived from practical demonstrations, documentation, peer appraisals, client service reports, client surveys, supervisor reports, audiovisual material and practical assignments.</p> <p>The social and cultural factors involved, e.g. communication and problem-solving, could be assessed through role-plays or discussions around critical incidents to illustrate key points in complaints handling.</p> <p>Particular attention needs to be given to ensuring that candidates understand the distinction between general market research techniques and the generation and use of client satisfaction appraisal systems and methods.</p> |
| Scope of application | This unit applies to real estate agency management. |
| Required workplace performance | The competencies described in the unit may be achieved under limited supervision, within the broad framework established by an agreed strategic plan and associated budget. Judgement is required to make and act on decisions. |

Resources required for assessment include:

- an appropriate venue
- access to agency information, procedures and protocols
- assessment instruments where available
- audiovisual equipment

Underpinning knowledge

- Marketing strategies for real estate clients
- Customer relations and complaints handling procedures
- Business ethics
- The nature and structure of the property industry
- Agency roles and responsibilities in relation to the provision of information
- Risk management
- Market research methods

Underpinning skills

- Communication, including team communication, staff counselling and complaints management
- Information management
- Problem-solving and networking
- Literacy, including business correspondence
- Telephone technique
- Public presentation
- Team work in developing and implementing client service strategies

PRDRE04A**Unit Descriptor****Manage and monitor effective client service**

This unit covers over-the-counter and telephone responses to service requests and enquiries relating to listed properties and agency services.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Maintain clear lines of communication | 1.1 Information is provided to client which is timely, relevant and accurate 1.2 Information on client needs is conveyed to others in a manner which improves customer relations and the quality of services 1.3 Client service records are maintained and provide an accurate and objective record of communication with clients |
| 2. Review client relations policy | 2.1 Client satisfaction is monitored and used to modify or adjust client contact activities 2.2 Client feedback on quality of services is used to improve performance in client contact 2.3 Information on agency services is reviewed and updated to reflect current client expectations and improve professional image 2.4 Opportunities arising from information provided by clients is used to update the agency marketing strategy and allied services |
| 3. Develop client loyalty | 3.1 Client service strategies are followed to maximise the opportunity for repeat business 3.2 Services are provided to minimise client dissatisfaction and maintain a reputation for service 3.3 Client service strategies are integrated into the delivery of agency services 3.4 Performance indicators are developed and measured against agency client service to enable policy review and activity adjustment to occur |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|-------------------------------|---|
| Type of client service | may include lease enquiries, information about agency services in relation to specific property, property management, current and planned real estate developments, contract administration, sales, or property management. |
| Research | includes information on agency database and printed information held by industry and community groups. |
| Communication of need | may be by e-mail or other electronic method, by memo, or verbal. |
| Relevant bookings | include appointments for visits, meetings, travel, inspections or listings. |
| Files | could be electronically or manually maintained. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted in conditions that closely resemble normal work practices for a person with responsibilities identified in the unit.</p> <p>Evidence of competency will be derived from relevant documentation and practical demonstrations involving at least three different types of query and supervisory/client reports.</p> |
| Scope of application | This unit is relevant across all areas of real estate agency service. |
| Required workplace performance | The work will involve some initiative within broad parameters established by agency and property marketing strategies. |
| Resources required for assessment include: | <ul style="list-style-type: none"> • assessment instruments • multimedia equipment • relevant forms/documents for recording queries • agency case studies • suitable venue |
| Underpinning knowledge | <ul style="list-style-type: none"> • Agency operations and processes to manage and monitor effective client service • Work allocation procedures to manage and monitor effective client service • Sources of information/researched data • Information management systems |

Underpinning skills

- Use of computer databases
- Telephone skills
- Interpersonal communication in an agency setting
- Applied research to access internal and external property information
- Ability to screen calls to establish purpose of query

PRDRE05A**Unit Descriptor****Market agency**

This unit covers the development and implementation of a marketing strategy to position the agency in the property market. It does not cover marketing required for individual properties. The outcomes of this unit will inform, and be informed by, the outcomes of strategic planning.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---------------------------------|---|
| 1. Undertake market research | <ul style="list-style-type: none"> 1.1 Market research methods are developed which provide a sound base for the creation of a property database and comparative analysis of property markets 1.2 Research is undertaken which provides a sound base for operational marketing decisions to be made |
| 2. Develop marketing strategy | <ul style="list-style-type: none"> 2.1 Organisation's business plan, needs of the existing client base and the nature of further business opportunities are established that are appropriate to the scope of market opportunities available to the agency 2.2 Relative strengths and weaknesses of competitors are assessed to identify opportunities for competitive advantage and for inclusion in marketing strategies 2.3 Marketing strategies are formulated to position the agency in the property market and to minimise adverse effects of direct competition on the agency 2.4 The marketing strategy is presented to all stakeholders ready for their consideration 2.5 The marketing strategy is developed based on the needs of key stakeholders and to enable its implementation within agency services |
| 3. Implement marketing strategy | <ul style="list-style-type: none"> 3.1 Agency's logo and mission statement are developed to promote positive public recognition of the services provided 3.2 Clients are clearly informed of value-added services that are provided by the agency 3.3 Materials which are easy to read and understand are produced as a ready reference for sales staff 3.4 Community networks are accessed to promote the agency's services 3.5 Service fees are charged which are consistent with agency business objectives and are able to be consistently understood and applied by relevant staff |

- | | |
|---|--|
| 4. Review and adjust marketing activities | <ul style="list-style-type: none"> 4.1 Marketing activities are regularly reviewed against agreed benchmarks and targets 4.2 Organisational objectives are planned to enable their achievement to be assessed 4.3 Information is made readily available and recorded for discussion with stakeholders 4.4 Reports are produced which provide a logical flow of information and are presented with key points and recommendations for discussion with stakeholders 4.5 Stakeholder recommendations are presented to allow for implementation in revised marketing plans, whose effectiveness is regularly monitored 4.6 Agreed agency services are regularly assessed and adjusted to reflect agreed marketing policies |
| 5. Select and promote agency services | <ul style="list-style-type: none"> 5.1 Agency services are selected to maximise competitive advantage and profitability and address stated client requirements 5.2 Achievable targets are set for each service, which are in line with the business marketing plan and the size and nature of the agency 5.3 Cost benefit analysis is performed on services delivered, to enable the determination of the overall financial viability of individual services 5.4 Service performance is reviewed periodically, allowing for adjustments to be made in line with changes in the marketplace |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Legislation

includes common law duty of care provisions, including laws of contract and tort affecting the presentation of the agency to the public; Trades Practices Act and other legislation at the State/Territory level; and federal and State laws and regulations affecting the agency licensing, where these exist.

| | |
|--|---|
| Sources of information | include information provided by industry associations, government agencies, educational institutions and franchise networks, and data generated and held by the agency. |
| Market demand | may be influenced by changes in interest rates, availability of finance, government savings policies and consumer preferences. |
| Type of client | may include financial institutions, property owners, local, State and Commonwealth government authorities, international agencies, vendors, purchasers, lessees, lessors, companies, property trusts and trustees, insurance firms and other professionals. |
| Maturity and size of the business | may include privately owned real estate agencies; sole owners or partnerships, property trusts or companies as agencies operating within franchise networks. |
| Marketing budget | may vary depending on the size and nature of the business and the services on offer. |
| Technologies used to promote the agency | may include public presentations, written publications group marketing materials, multimedia or video materials and materials for distribution through Web pages on the Internet or similar telecommunications media. |
| Stakeholders | are all clients and customers associated with the agency's business activities. |

EVIDENCE GUIDE

| | |
|------------------------------|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business planning and management assignment that closely resembles normal work practices.</p> <p>Evidence of competency should include assessment of the individual's understanding of underpinning knowledge, and a practical demonstration of the required skills involved in successful agency marketing. Evidence of competency may be derived from a variety of sources, including:</p> <ul style="list-style-type: none">• portfolios of material produced by individuals or teams working on a marketing project• interviews and surveys• discussions of case studies• a marketing plan for a real estate agency |
| Scope of application | This unit has application in the management of real estate agency practice. |

Required workplace performance

At the agency principal level, the unit requires the work to be done without supervision. It will require the total expression and responsibility at law-including reasonable responsibility for the work of others in gathering information and coordinating work.

Where the work described in this unit is required to be performed as part of a general management role, accountability and responsibility will be qualified and depend on final endorsement by the key stakeholders.

Resources required for assessment include:

- a suitable venue, including relevant audiovisual equipment

Underpinning knowledge

- Agency marketing principles and practice
- Quality assurance principles and practice
- A working knowledge of market forces, including the effect of supply and demand on agency services
- Relevant statutes and legal principles affecting agency marketing
- Professional ethics for marketing in real estate
- Marketing activities, including direct and indirect marketing strategies
- Publishing and materials distribution
- Strategic business planning for an agency
- Financial management for an agency
- Communication techniques: group, interpersonal and mass media
- Multimedia information technologies

Underpinning skills

- Planning and organising, including time management
- Market research and data analysis
- Information management
- Literacy and numeracy as applied in budgeting, report writing and information presentation
- Creative presentation and graphic design and layout
- Use of information technologies
- Public presentation
- Communication
- Team work to market the agency

PRDRE06A**Unit Descriptor****Manage human resources**

This unit covers all aspects of personnel management, including recruitment, induction, performance appraisal, staff counselling and performance-based productivity in relation to human resource management.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Define agency human resource requirements | <ul style="list-style-type: none"> 1.1 Personnel needed to deliver agency services are identified with agreement from stakeholders 1.2 Management and service delivery plans are produced which reflect identified needs and support the employment and skilling of personnel 1.3 Agency recruitment and performance standards are made known and are acceptable to existing personnel 1.4 Staff performance appraisal procedures are developed and agreed in consultation with key stakeholders 1.5 Remuneration packages are calculated based on identified agency needs and related market conditions |
| 2. Undertake staff recruitment | <ul style="list-style-type: none"> 2.1 Staff are recruited in accordance with needs identified in agency management plans 2.2 Job descriptions and duty statements are produced which address position requirements, including performance criteria 2.3 Staff are recruited to meet agreed enterprise and community standards 2.4 The position and the agency are effectively marketed to attract high calibre staff 2.5 Effective interview techniques are used to facilitate the selection of the most suitable candidate 2.6 Terms and conditions are clearly communicated to, and acknowledged by, candidates 2.7 Candidate selection criteria are sufficiently clear to be used to evaluate claims against the competency requirements of the position |
| 3. Administer employment contracts | <ul style="list-style-type: none"> 3.1 Employment contracts reflect the informed position and intent of both parties and meet statutory requirements 3.2 Input from relevant parties enables agreed terms and conditions of employment to be documented and reviewed at regular intervals 3.3 Administration of the contracts ensures that the agreed terms and conditions of employment are met by both parties 3.4 Personnel records enable the quick and efficient retrieval of relevant information |

- | | |
|---|---|
| 4. Monitor and review staff performance | 4.1 Negotiated performance benchmarks and conditions of performance review are established to enable constructive negotiation to lead to a satisfactory outcome for all relevant parties 4.2 Performance is evaluated against predetermined standards and records are maintained to the satisfaction of all relevant parties 4.3 Regular evaluation of assessment procedures are conducted to enable adjustments to reflect agency and community personnel management practices and standards 4.4 Written employment contracts providing a clear, accurate and objective record of agreements reached on employment terms and conditions are provided to staff |
| 5. Promote effective communication | 5.1 Regular staff meetings and activities are provided to establish ongoing opportunities for open and effective communication and problem-solving to occur 5.2 Communication strategies are employed to enhance information flows and team work in the agency |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 3 |

RANGE STATEMENT

- | | |
|---|---|
| Agency business and service plans | may not be recorded, in which case other evidence may be used to formulate the human resource management strategy. |
| Commercial environment remuneration packages | may include consideration of current employment remuneration practices, anticipated trends in sales commissions/service fees and available personnel and management budgets. |
| Existing organisational systems and structures | may include legislative, administrative, financial, and personnel management systems already in place. |
| Size and type of business | may include privately owned real estate agencies, valuation, property management firms, sole practitioners or partnerships, and franchise operations, as well as government agencies involved in the provision of real estate services. |

| | |
|--|--|
| Existing awards/contracts of service | may include common law contracts, as well as industrial awards and enterprise work agreements, where relevant. |
| Privacy provisions | include confidentiality of personnel records and security of data systems. |
| Performance indicators | may include customer satisfaction with services provided, sales and turnover ratios, ratio of interviews to agency agreements entered into, percentage of sales obtained from listings, time management and efficiency of the induction process, and be affected by the range of agency services on offer. |
| Development of job descriptions and selection processes | may need to consider personal attributes, skill levels, and knowledge and experience of the individual. |
| Information | may include information provided through industry and professional associations and government agencies, as well as information generated and held by the agency. |
| Labour market programs | may include traineeships, cadetships or other forms of work experience programs. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business management assignment that closely resembles normal work practices.

Evidence of competency should include consideration of the efficiency and effectiveness of the personnel management system and the effect of the system on the agency as a whole.

Assessment of evidence should also establish the individual's understanding of factors affecting the proposed personnel management system and the relationship of this system to other management systems in the agency. Particular attention should be paid to:

- staff use of the personnel database
- organisational cultures and practices and their influence on performance appraisal
- use of visual aids, organisational charts, agency personnel record sheets, and databases to demonstrate the advantages of the system
- the ability to relate statutory requirements (e.g. occupational health and safety, industrial relations, unfair dismissal provisions and occupational licensing/registration) to individual and agency records management
- confidentiality and privacy provisions

The human factors involved could be assessed through role-plays and case study discussions to illustrate key points.

Scope of application

The unit has application in all areas of real estate agency management.

The application of this unit involves accountability for the implementation of a human resource development plan and personnel management strategies matched to the agency strategy plan.

Required workplace performance

Activities may be carried out routinely or involve creative management of change. Work is likely to be undertaken under supervision with limited responsibility for the work of others.

Resources required for assessment include:

- information about the agency
- audiovisual equipment
- a portfolio of material produced by the candidate
- a suitable venue

Underpinning knowledge

- Relevant real estate industrial awards
- Common law employment contracts in the real estate industry
- Relevant statutes relating to:
 - long service leave
 - occupational health and safety
 - workers compensation
 - equal employment opportunity legislation
 - redundancy and termination agreements
 - agency policy and recruitment practices
 - personnel management systems
 - industrial law
 - corporate law
 - EEO statutory legislation

Underpinning skills

- Communication, including industrial negotiation, staff counselling and motivation
- Conflict resolution
- Interviewing for recruitment in a real estate agency
- Time management in real estate
- Planning and organisation in real estate
- Literacy and numeracy
- Database management and personnel record-keeping within an agency setting
- Application of legislative provisions to personnel management in real estate

PRDRE07A**Implement staff skill development and training****Unit Descriptor**

This unit covers staff skill development as part of a human resource development strategy, rather than personnel management.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Provide continuing performance development opportunities to improve agency productivity and the career prospects of staff | 1.1 Performance reviews to establish training needs in relation to individual and agency requirements are conducted on a regular basis 1.2 Training opportunities to enhance the employment related skills of staff within the agency are arranged regularly 1.3 Training records to enable the effectiveness of training to be evaluated against the skill development requirements of the agency and the level of investment made are maintained 1.4 Staff training is identified as an essential element in improving the performance of the agency in the marketplace |
| 2. Induct new staff and evaluate induction processes | 2.1 Induction processes structured around time and staff availability and individual learning requirements to minimise time spent off the job and maximise the transfer of learning on the job, are conducted 2.2 Opportunities for the effectiveness of the induction process to be reviewed are developed in association with new employee 2.3 Induction activities are reviewed on a regular basis, and changes implemented as required |
| 3. Review training activities | 3.1 Training outcomes are able to be assessed against agency expectations 3.2 Individual and group training records are accessible and able to be updated to provide a fair and accurate record of training outcomes 3.3 Confidentiality of personnel records is able to be maintained through the use of appropriate security arrangements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 3 |

RANGE STATEMENT

| | |
|---|---|
| Agency business and service plans | may be recorded, in which case anecdotal evidence should not be used to formulate the human resource development strategy. |
| Existing organisational systems and structures | may include legislative, administrative, financial and personnel management systems already in place. |
| Size and type of business | may include privately owned real estate agencies, valuation, property management firms, sole practitioners or partnerships, and franchise operations, as well as government agencies involved in the provision of real estate services. |
| Privacy provisions | include confidentiality of personnel records and security of data systems. |
| Individual needs | may include the need for a skills analysis and jobs analysis to assist in improved job and training design. |
| Information | may include information provided through industry and professional associations and government agencies, as well as information generated and held by the agency. |
| Labour market programs | may include traineeships, cadetships or other forms of work experience programs. |
| Continuing performance development activities | may include structured training delivered on or off the job; job rotation in various service positions; professional development and structured project or research activities. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business management assignment that closely resembles normal work practices.

Evidence of competency should include consideration of the efficiency and effectiveness of the personnel management system, the relationship between human resource development (HRD) and personnel management.

Assessment of evidence should also establish the individual's understanding of factors affecting effective HRD, and the relationship of this system to other management systems in the agency. Particular attention should be paid to:

- staff use of training information and records
- organisational cultures and practices and their influence on HRD plans and practices
- use of visual aids, organisational charts, agency personnel record sheets, and databases to demonstrate the advantages of the HRD system to the agency
- the ability to relate statutory requirements to individual, and agency records
- confidentiality and privacy of individual records.

The human factors involved could be assessed through role-plays and case study discussions to illustrate key points.

Scope of application

The unit has application in the management of a real estate agency. The application of this unit involves accountability for the implementation of a human resource development plan matched to the agency strategic business plan.

Required workplace performance

Activities may be carried out routinely or involve creative management of change.

Work is likely to be undertaken under supervision with limited responsibility for the work of others. Some judgement may be required in the planning and selection of training activities.

Resources required for assessment include:

- information about the agency's existing HRD strategy
- audiovisual equipment
- a portfolio of material produced by the candidate
- a suitable venue for interviewing candidates

Underpinning knowledge

- Prescribed training in real estate industrial awards
- Common law employment contracts in real estate
- Agency policy and recruitment practices
- Real estate personnel management systems
- Training required for occupational and business licensing in the real estate and allied property services industry

Underpinning skills

- Communication, including staff counselling and motivation techniques
- Conflict resolution and team building
- Time management
- Planning and organisation of skill development and training
- Literacy and numeracy
- Database management and personnel record-keeping

PRDRE08A**Unit Descriptor****Manage efficient financial systems**

This unit covers strategic management of finances in a real estate agency. It includes systems design to accommodate accounting, budgeting, cash flow analysis and financial planning. It is not concerned with day-to-day bookkeeping or clerical administration of financial records. Performance outcomes in this area are directly linked to agency performance as defined in the agency strategic plan.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Establish system requirements | <ul style="list-style-type: none"> 1.1 Requirements for efficient financial administration are able to be determined from consultation with relevant stakeholders and an analysis of existing financial plans 1.2 Reporting and procedural requirements impacting on agency activities are identified and recorded for future reference in agency activities 1.3 Internal financial audit controls included in the system specification provide a satisfactory security mechanism 1.4 Risks to the security of financial records have been identified and contingency plans to manage this risk are identified and costed |
| 2. Design financial management systems | <ul style="list-style-type: none"> 2.1 Sources of competent assistance and advice are able to be accessed and used to secure financial records and assets 2.2 Financial management system is designed to ensure accurate and timely provision of information about agency transactions, working capital and cash flow 2.3 Equipment and software needed for the operation of the system are identified, acquired and installed to support agency transactions 2.4 Financial reporting requirements are known and used by relevant agency personnel 2.5 Financial reports are established which ensure the accurate and timely provision of data required for financial decision-making 2.6 Agreed schedules of account recording and reconciliation systems are produced at regular intervals to support agency service provision and business decisions 2.7 Mechanisms for the review of terms of trade and fee structures are suited to the organisation's needs and meet industry practice standards 2.8 Financial reports prepared at regular intervals in the required format meet external audit requirements |

- | | |
|---|--|
| 3. Prepare and review financial plans | 3.1 General agency and trust account operations are regularly reviewed to provide true, accurate and separate records of agency and business transactions 3.2 Agency financial plans are linked to reviews of the agency strategy business plan to enable timely financial adjustments to be made 3.3 Planning and implementation of financial management activities enable probity to be maintained 3.4 Financial plans provide a reasonable basis for agency budgeting and ongoing financial management of the agency |
| 4. Monitor and review financial reporting systems | 4.1 Financial reporting systems are evaluated through an assessment of agency performance against agreed performance indicators to enable timely adjustments to be made to agency business investments 4.2 Financial reports and systems are able to be used by authorised staff to manage agency finances |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 3 |

RANGE STATEMENT

- | | |
|--|---|
| Business plans | may include consideration of written or verbal agency business and marketing plans. |
| Commercial environment | may include consideration of available finance, returns on investments, government policy, and the effect of interest rates on financial asset management. |
| Size and type of business | may include privately owned real estate agencies, valuation, property management firms, sole practitioners or partnerships, franchise operations, as well as government agencies involved in the provision of real estate services. |
| Existing organisational systems | may include systems managed in the agency structure or systems managed through contracts with outside agencies such as accountants. |

| | |
|--|---|
| Technology | may include traditional paper-based systems or computer-based, multimedia financial management systems. Software may be industry specific or proprietary in nature. |
| Performance indicators | may include consideration of the timeliness and accuracy of financial reports produced and productivity improvements resulting from the use of the system. |
| Legislation | may include: <ul style="list-style-type: none"> • consideration of legislation and codes of practice relating to financial record-keeping, including trust accounting, taxation and auditing of public funds requirements • consideration of legal contracts involving loans, overdrafts and mortgages on agency assets |
| Type of bookkeeping system used | may be cash-based, accrual or current opportunity cost accounting, provided these meet Australian Standards for bookkeeping. |
| Risk management | may include need for professional indemnity, asset insurance, personal accident, sickness insurance and public liability insurance. |

EVIDENCE GUIDE

| | |
|------------------------------|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business management assignment that closely resembles normal work practices.</p> <p>In particular this unit may be assessed in conjunction with unit PRDRE09A Implement and monitor financial management systems.</p> <p>Evidence of competency should include consideration of the quality of financial reports - including their usefulness in financial planning and management and evaluation of the agency's financial standing.</p> <p>Portfolio or assignment evidence could be supplemented, if necessary, by interviews, discussions of key aspects of the assignment, essays or short-answer questions on key points. Particular emphasis needs to be given to the separation of business, agency and personal accounts and the management of risk through appropriate and timely financial reporting.</p> |
| Scope of application | Activities will be confined by general parameters established in strategic real estate agency business and marketing plans. Audit and reporting requirements will usually be established in consultation with agency business advisers, including accountants and auditors. |

Required workplace performance

Work is undertaken within a broad strategic framework and subject to regular time constraints and deadlines.

Some discretion is allowed in the interpretation of financial plans and the selection of a bookkeeping system to complement the requirements established by the financial plan and associated management activities.

Resources required for assessment include:

- access to multimedia information technology
- input from the candidate's immediate supervisor or peers, if appropriate

Underpinning knowledge

- Models of best practice in the property services industry
- Principles of financial management applied in real estate
- Legislation relating to trust accounting, trade practices, taxation
- Accounting and bookkeeping for financial control
- Administrative routines and practices
- Industry codes of practice, including Australian Standards Association standards on financial management, bookkeeping, and reporting and auditing requirements in small business management
- Franchise and marketing group audit requirements
- The application of computerised financial management software to general management and real estate agency practice
- Quality principles and practice
- Terminology used in the sale and management of property

Underpinning skills

- Planning and organising activities and systems in an agency
- Real estate costing and budgeting
- Literacy and numeracy
- Decision-making
- Research into managing efficient financial systems
- Financial report preparation
- Computer literacy, including the use of multimedia technology
- Team work in relation to managing efficient financial systems
- Communication negotiation, interpersonal and group communication

PRDRE09A Implement and monitor financial management systems

Unit Descriptor This unit covers the establishment and maintenance of records of agency financial transactions.

Unit Sector Real estate

ELEMENT

PERFORMANCE CRITERIA

- | | |
|--|---|
| 1. Establish and maintain financial records | 1.1 Requirements for efficient financial administration are determined from consultation and an analysis of financial plans 1.2 Financial record-keeping systems are designed to provide accessible, timely and accurate information on financial transactions 1.3 Information about financial transactions is systematically collected, entered and checked for accuracy at regular intervals |
| 2. Prepare format for presentation and delivery of financial reports | 2.1 The purpose and frequency of financial reports is communicated to relevant agency personnel to ensure their provision in a timely manner 2.2 Schedules of accounts and records of financial transactions are able to be accessed by authorised staff and reconciled at regular intervals 2.3 Financial reports are prepared in the required format to enable a true reflection of the agency's financial standing to be determined by authorised personnel and auditors |
| 3. Monitor financial transactions | 3.1 Financial account transactions are monitored at regular intervals to enable adequate cash reserves to be maintained 3.2 Consistently accurate financial reports and summaries are produced at regular intervals to enable ongoing assessment of agency performance 3.3 Performance indicators which include scrutiny of cost centres are used to improve performance |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---|---|
| Statutory documents which act as reference points for bookkeeping activities | include tenancy contracts, trust accounts, property management and sales contracts, accounts and security deposits, payrolls, insurance, and receipts and invoices. |
| Type of bookkeeping systems used | may include computer-based or hard-copy books of account. |
| Methods used to maintain records | may be cash-based, accrual or current opportunity cost accounting, provided these are consistent with Australian Standards for bookkeeping and accounting. |
| Type of transactions | includes invoices, accounts receivable and payable, bank deposits and transfers, purchase and sales records, insurances, cash flow statements, and preparation of records to trial balance. |
| Size and nature of the agency | may include records required for real estate sales, leasing, property management, property marketing; personnel management, and regulatory bodies. |
| The legal structure of the agency | may include partnerships, incorporated agencies, franchises or cooperatives. |
| Work required | may be done by one or several people, depending on the size and nature of the agency. |
| Reporting requirements | may be required on a daily, weekly, monthly, quarterly or annual basis. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of overall financial systems management.

In particular, this unit may be assessed in conjunction with unit PRDRE08A Manage efficient financial systems.

Assessment may be conducted on or off the job or in combinations of on and off-the-job assessment.

Assessment of evidence should establish the individual's understanding of underpinning statutory requirements associated with financial records and reports.

Evidence may be derived from:

- portfolios of materials produced by the individual, including financial plans, reports and evaluation reports
- case study discussions
- exercises involving problem-solving and contingency management
- interviews with supervisors and users of bookkeeping services

Where information relating to the agency is used in the assessment process, this should be treated as commercial-in-confidence.

Scope of application

The unit has application in all areas of real estate agency practice.

Required workplace performance

Activities will be confined by general parameters established in strategic agency plans. Audit and reporting requirements will usually be established by agency advisers, including accountants and auditors.

Work is undertaken within a broad strategic framework and subject to regular time constraints and deadlines.

Some discretion is allowed in the interpretation of financial plans and the selection of a bookkeeping system to complement the requirements established in the financial plan.

Resources required for assessment include:

- a suitable venue, including workstation, bookkeeping materials and case study materials
- a panel of assessors, including the candidate's immediate supervisor or peers, if relevant

Underpinning knowledge

- Agency administrative systems and office routines
- Principles of bookkeeping
- Agency security requirements
- Business ethics
- Trust account procedures
- Principles of business law as they relate to contracts and accounting procedures
- Australian Standards Association Code of Practice and Accounting Standards
- Taxation in relation to the real estate industry
- Trades practices applicable to real estate
- Franchise and marketing group audit requirements

Underpinning skills

- Work planning, organising, problem-solving and time management
- Literacy and numeracy
- Use of information systems for implementing and monitoring financial management systems
- Interpersonal and team/group communication concerning implementing and monitoring financial management systems
- Bookkeeping and financial report writing
- Report presentation
- Security and ethics in financial management and reporting

PRDRE10A**Unit Descriptor****Unit Sector****Manage agency risk**

This unit deals with minimising risk to all aspects of agency business.

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Analyse potential risks to agency and clients | 1.1 Objectives of agency and client are confirmed by consultation with key personnel and reference to available information 1.2 Likelihood of risk to objectives is assessed against an inventory of the current and planned agency/client assets, functions and existing risk management strategies |
| 2. Implement agency policies and procedures to minimise risk | 2.1 Causes of potential risk or existing threat to agency/client objectives are accurately identified 2.2 Potential sources of risk or threat are thoroughly evaluated to establish extent of risk and correct procedures implemented to minimise risk in line with agency policy |
| 3. Establish ongoing monitoring and reporting systems to minimise risk to agency and clients | 3.1 Potential risks are determined by monitoring risk environment with consideration of agency/client role, location and market stability 3.2 All potential risks/threats experienced by like organisations are assessed for relevance and the need to implement precautionary action 3.3 All risk information is accurately recorded to enable frequency and extent of potential threats to be monitored and enable significant threats to be remedied according to agency policy |
| 4. Ensure security of managed properties | 4.1 Agency business objectives and asset security are maintained by establishing appropriate insurance arrangements 4.2 All premium payments and claims are made in accordance with agency/client and insurance company requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---|---|
| The legal status of the agency | <p>is the legal structure under which the agency operates, for example:</p> <ul style="list-style-type: none"> • sole trader, partnership, registered business, franchise, body corporate/company • 'agency' within the meaning of the relevant property act and associated licensing requirements • 'agency' within any of the legal jurisdictions operating in Australia and associated laws, including corporations law, statutory law, taxation law, trades practices law, common law duty of care provisions; laws of contract and tort affecting real estate agency agreements, and those services provided for a fee |
| Type and size of business | <p>may include privately owned real estate agencies, valuation, property management, sole practitioners or partnerships, and franchise operations, as well as government agencies involved in the provision of real estate services.</p> |
| Quality assurance | <p>may include practice standards, ISO quality standards, franchise standards or enterprise standards.</p> |
| Physical resources | <p>may include information, money, facilities, office systems (manual and computerised), telecommunications equipment and human resources.</p> |
| Legislative and other risk factors | <p>may include occupational health and safety, public liability, professional indemnity, franchise and licence agreements, property ownership, including intellectual property, level of compliance with internal agency procedures and successful management of complaints. Specific areas of exposure may include:</p> <ul style="list-style-type: none"> • property management, including maintenance and discrimination • sales, including sale of property, incorrect disposal of chattels, code of ethics/practice, loss of documents, unauthorised disclosure, and sale of goods under warrant of execution • commercial sales and leasing, including miscalculation of rentable floor space, exclusivity of business (retail) • administration, including misrepresentation, defalcation, personal injury, and misappropriation |
| Relevant stakeholders | <p>(those having a financial interest) may include, but are not limited to, co-owners, staff and others to whom a duty of care is owed, and financial institutions with a financial interest in the business.</p> |
| Asset impact | <p>includes, but is not limited to, net worth of the business, goodwill value, cash flow viability and resulting liquidity, return on investment, and capital reserves.</p> |

Area of business may include rural, residential, retail, commercial, industrial, property valuation, specialist properties, including property used for tourism, leisure, community, medical and transport activities.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted as part of an assessment of an overall business management assignment.

Evidence of competency should demonstrate consideration of the efficiency of the total approach by an organisation to the protection of its assets, earnings, liabilities and personnel against predictable and unpredictable losses in order to achieve the maximum efficiency at the minimum cost.

Evidence used to assess competency could include:

- procedures implemented to manage risk, including identification, analysis, measurement and control measures
- systems, including staff use of information management systems, organisational procedures, company operations manuals, and confidentiality, security and privacy procedures
- Case study material rather than commercial-in-confidence material obtained from an employing agency, should be used in the assessment of this unit.

Scope of application This unit applies to agency management of all sectors of the real estate industry.

Required workplace performance The competencies described in the unit may be achieved under limited supervision, within the broad framework established by an agreed risk management plan and budget limitations. Where the competency is required to be performed as part of a general management role, accountability and responsibility will be qualified and dependent on final endorsement by the key stakeholders. Considerable judgement is required to make and act on decisions.

At the agency principal level, the unit requires the total expression of accountability and responsibility at law - including reasonable responsibility for the work of others.

Resources required for assessment include:

- computers and appropriate software and agency operational manuals
- relevant industry codes of practice
- a suitable venue, either in the workplace or classroom
- a panel of assessors, including the candidate's immediate supervisor or peers, if relevant

Underpinning knowledge

- Financial management and control techniques
- Relevant legislative framework impacting on the provision of services in the real estate industry
- Professional indemnity
- Business planning
- Professional ethics for real estate
- Quality assurance
- Procedures

Underpinning skills

- Organising and controlling information to manage agency performance
- Written communication skills, including literacy
- Problem-solving
- Judgment
- Communication, including negotiation, interpersonal and group techniques to manage agency performance
- Research
- Numeracy, including the use of simple statistics

PRDRE11A**Provide property appraisal****Unit Descriptor**

This unit covers research and evaluation of property market trends affecting the rental, sale and management of property for listing purposes. It does not address the formal valuation of real estate.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Obtain and analyse market information | 1.1 Appropriate sources of information are identified and relevant information is obtained by accessing databases 1.2 Factors affecting the returns on property are identified and evaluated within known market trends |
| 2. Research and record property factors and rental price indicators | 2.1 Market conditions and vacancy factors are thoroughly researched and evaluated within the agency context 2.2 Price indicators are established that reflect local factors and conditions and which can be applied within agency guidelines |
| 3. Formulate accurate advice to assist clients in making informed decisions | 3.1 Information affecting property prices is presented as factual, up-to-date and relevant to the property under discussion 3.2 Local market factors affecting returns on property are explained to the client and included in discussions about available options 3.3 Relevant information is provided to the client in written reports |
| 4. Maintain relevant property records to assist appraisals and listings | 4.1 Records are maintained to identify past and current property trends and opportunities for listings 4.2 Databases are developed that are accessible, up-to-date and provide an accurate record of current property market trends and conditions relevant to the property market serviced by the agency |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 2 |
| Working with others and in teams | - |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Commercial environment may be affected by rising, steady, or falling markets.

| | |
|--|---|
| Finance market conditions | may be affected by availability of finance, sources of finance, interest rates, and mortgage arrangements. |
| Purpose of the opinion | is to establish the most likely selling or leasing price obtainable in the current marketplace, having regard to the property's highest and best use. |
| Factors involved in providing the opinion | may include the client's need for information on which to base an estimate of potential income or capital gain from the rent, and sale or development of property sites. |
| Size and location of the market | may include local, regional, national or international markets. |
| Market indicators used | may include perceptions of the area, type of client likely to be attracted to that market, market rents in the area, vacancy rates and absorption rates. |
| Sources of information | may include statistics from statutory bodies, urban planning and local government databases, locality maps, demographic (socio-economic) data on populations in the catchment area, agency property management/sales reports, locality maps, cadastral maps, commercial analysts' reports, and reports from appropriate relevant local authorities. |
| Occupational licensing | may affect the ability of the individual to provide the information and the format in which the information is provided. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of overall sales operations within conditions that resemble normal real estate work practices.

Evidence of competency should include consideration of the techniques and uses made of information derived from data sources, or created by the individual as part of the property appraisal process and could include case studies and discussion about the choice of selection of various databases.

Assessment of evidence should establish the individual's understanding of the factors affecting the market, the client's motivation for seeking an appraisal and the difference between appraisal and formal, professional valuations.

Skills in communication could be assessed through role-plays, case study discussion and information presented in written or verbal format.

Evidence of competency may include or be derived from:

- written market analysis reports
- audiovisual or verbal presentation of appraisal reports
- client surveys and lists/databases of property values
- assignment reports

Scope of application

This unit has application in all areas of real estate agency practice.

Required workplace performance

The competencies described in this unit may be performed under limited supervision, within the broad framework established by agency marketing and administration practices.

Some judgement is required in interpreting information and providing suitable advice to clients.

Resources required for assessment include:

- access to agency databases
- suitable venue
- multimedia equipment, including overhead projectors and computers, including relevant software, if necessary

Underpinning knowledge

- Urban zoning
- Investor activity in the marketplace
- Local market conditions
- Trend factors affecting the market
- Current home building/rental and sales costs

Underpinning skills

- Basic comparison techniques of properties
- Research into property appraisal
- Records management
- Report writing
- Map reading and plan interpretation
- Interpretation of demographic (socio-economic) data
- Reading and applying elementary statistics to property appraisal
- Communication: interpersonal and group
- Team work in relation to property appraisal

PRDRE12A**Unit Descriptor****Establish and expand client base**

This unit covers those activities associated with identifying possible clients for listing properties in both sales and property management.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Service existing client base | 1.1 Existing client base is maintained in accordance with agency business plan and marketing strategy 1.2 Opportunities are identified for agency sales and listings |
| 2. Develop a business network | 2.1 Contact is made with potential clients consistent with agency image and marketing plan 2.2 Listings are obtained by following procedures consistent with agency protocols 2.3 Business opportunities are generated by follow-up and networking activities 2.4 The agency marketing strategy and business goals and objectives are consistently met within all business networking activities |
| 3. Implement strategy to expand client base | 3.1 Promotional activities are undertaken which generate enquiries and inform prospective vendors of agency services 3.2 Marketable listings are obtained by following up all enquiries 3.3 Attainable listing targets are set in budgets and marketing strategy |
| 4. Communicate outcomes of prospecting activities to key stakeholders | 4.1 Staff initiative and client confidence in agency services is fostered and supported by communication of the outcomes of prospecting activities 4.2 Accessible records are maintained to provide an accurate and useable source of agency information |
| 5. Maximise repeat business opportunities | 5.1 Contact with prospects is maintained over time to ensure clients' informed consent to agency activities 5.2 Information likely to be of interest is circulated to prospective clients, and followed up at strategic intervals 5.3 Relevant follow-up discussions are held with clients to facilitate stated business needs 5.4 Marketing activity results are recorded in accessible databases to provide useful market references |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|--|
| Commercial environment | commercial considerations include vacancy rates, possible financial returns on property listings and availability of property stock. |
| Type and size of business | may include privately owned real estate agencies, property management groups, sole practitioners, partnerships or franchise networks. |
| Supporting systems and structures | includes use of facilities, equipment and administrative support staff. |
| Statutory requirements | may include ethics and statutes relating to commercial-in-confidence transactions, the presentation of information regarding the agency and compliance with State/Territory legislation, including fair trading. |
| Codes of practice | include agency and industry codes of practice governing professional relationships in this area. |
| Available marketing information | includes information available through the agency, industry associations, local government authorities, and local knowledge of the market. |
| Category of service | applies to all service areas in the real estate industry. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency may be undertaken as part of an assessment of general agency sales and marketing techniques.

Assessment should include consideration of vendor satisfaction with the quality of information and service provided and the potential for repeat business.

Evidence of competency could be derived from a number of fields of practice (sales, rental, property management) or from one area only, if the agency specialises in that type of service.

Tools for assessment of competency could include:

- case study discussions
- agency documentation, including listings, work plans and marketing reports
- supervisor reports, peer reports
- assignment reports
- multimedia materials

Scope of application

This unit applies in all service areas of the real estate industry.

Required workplace performance

Work is undertaken with minimal supervision and may involve supervision of others. It may also entail some discretion in decision-making and negotiation with vendors and buyers. Work is generally supported by organisational structured and opportunities generated through agency marketing.

Resources required for assessment include:

Where information relating to the employing agency is used in the assessment process, this should be treated as commercial-in-confidence.

- a suitable venue
- documentation, including any of those documents listed above

Underpinning knowledge

- Zoning and other regulations affecting property usage
- Market trends
- Development opportunities and general knowledge of local markets
- Statutory and common law duty of care in relation to listing in the property market
- Agency listing practices and industry codes of practice
- Marketing principles
- Client database management principles
- Zoning and other regulations affecting property usage
- Property appraisals

Underpinning skills

- Planning and organising work
- Communication, including telephone techniques and selling techniques
- Desktop publishing
- Information management, including record-keeping
- Business correspondence concerning client base
- Ability to access and apply legislation relating to property usage
- Market trends research strategies in relation to establishing and expanding client base

PRDRE13A**Unit Descriptor****Obtain property listings**

This unit covers the relationship and interactions between agency staff and clients leading to a successful listing of property for sale or management. This unit does not address the actual marketing or sale of the property under an agency contract.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Establish and monitor client motivation and expectations of the agency | 1.1 Client expectations of the agency and the market are clarified to the satisfaction of all relevant parties and accurately confirmed in writing 1.2 Clients are educated as to market influences affecting returns of property sales and rentals by provision of reliable information on market trends affecting the subject property |
| 2. Deliver property listing presentations | 2.1 Prospective clients' motivation for listing the subject property is established 2.2 Information obtained from a visual inspection of the subject property is used to provide prospective clients with a realistic range of marketing options 2.3 Prospective client expectations of the agency and the market are clarified and documented for future reference 2.4 Market influences likely to affect the subject property listing, through the provision of reliable information on market trends, are conveyed to prospective clients and reflected in client instructions to act |
| 3. Provide advice on available options | 3.1 Reliable and valid information is obtained from visual property inspection to provide clients with a realistic range of marketing options 3.2 Client's questions are used to clarify the available risks and options involved before entering into an agreement as to the terms and conditions of sale/rent 3.3 Client expectations are confirmed in writing to avoid ambiguity and minimise misunderstanding regarding terms and conditions of agency service |
| 4. Provide property appraisals | 4.1 Appropriate market information is obtained and accurately analysed against market factors and known market trends 4.2 Accurate property advice is formulated, and discussed and/or provided in writing to assist clients in making informed decisions 4.3 Relevant property records are accurately maintained and updated to enhance property appraisals and listing processes for future clients |
| 5. Secure property marketing listing | 5.1 Relevant parties are informed of the property listing 5.2 Listing documentation is completed to reflect agency, client and statutory requirements |

PRDRE13A Obtain property listings

- | | |
|---|---|
| 6. Negotiate fees and conditions with lessors | 6.1 Agency fee guidelines and structures are explained to vendors/landlords and any questions clarified and, where possible, concerns addressed |
| | 6.2 Fees and conditions are negotiated and established with vendors/landlords within agency guidelines |
| 7. Record and act on instructions | 7.1 Client instructions are recorded to meet sales/auctioneering legislative requirements and agency record-keeping requirements |
| | 7.2 Marketing plans for the subject properties are developed to reflect negotiated agreement |
| | 7.3 Business documents are produced to reflect advice to relevant parties involved in the listing transaction |
| | 7.4 Information to clients is provided to reflect progress made within the terms of the agreement |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT**The commercial environment**

may affect the range of options available.

Commercial considerations

include vacancy rates, possible financial returns on sales or rents, replacement value of the property and capital appreciation of the property in the market.

Type and size of business

may include privately owned real estate agencies, property management groups, sole practitioners or partnerships or franchises. They are unlikely to include government agencies involved in the provision of housing.

Existing organisational systems and structures

may include financial, administrative and customer service arrangements already in place, or require the establishment of these processes, depending on the maturity of the business.

| | |
|--|--|
| Statutory requirements | may include information management related to consumer protection legislation, particularly fair trading legislation. They require the application of common law duty of care provisions in providing advice to vendors. |
| Required industry codes of conduct and accepted ethical standards | should be applied in all cases. |
| Systems and information support | is generally provided by way of predetermined packages and occurs within an agreed pricing strategy for each listing. |
| Category of client | includes individuals, groups, private or public enterprises. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of a property marketing assignment that closely resembles normal work practices.</p> <p>Assessment of competency should include consideration of vendor satisfaction with the quality of information and service provided.</p> <p>Evidence of competency could include:</p> <ul style="list-style-type: none"> • discussion of case studies • documentation, including contracts/agreements, listing advice, reports, listing kits • appointment books, diaries and meeting records and correspondence with vendors • observation of actual performance through practical display of communication skills in role-plays or under work conditions • supervisor reports, letters of confirmation or verification from previous employment/learning situations |
| Scope of application | This unit applies across all areas of the real estate industry. |
| Required workplace performance | <p>Work is undertaken with minimal supervision and may involve supervision of others. It may also entail some discretion in the making of decisions and in negotiation with vendors and buyers. Work is generally undertaken and supported by organisational structures and opportunities created by agency marketing.</p> |
| Resources required for assessment include: | <p>Where information for assessment includes information provided by the employing agency, this should be treated as commercial-in-confidence.</p> <ul style="list-style-type: none"> • a property to appraise • documentation, including project reports and assignment results |

Underpinning knowledge

- Zoning and other regulations affecting property usage
- Market trends in relation to obtaining property listings
- Marketing practices in relation to obtaining property listings
- Types of property and investment opportunities
- Financial constraints attached to each type of property
- Legal and contractual environment
- Agency listing practices
- Industry codes of practice
- Statutory and common law duty of care

Underpinning skills

- Planning and organising work, including time management and problem-solving
- Property appraisals
- Communication skills: interpersonal, negotiation and group
- Information management
- Preparation of listing contracts
- Use of real estate advertising and marketing techniques
- Use of word processors and electronic databases

PRDRE14A**Market property****Unit Descriptor**

This unit covers those activities used to advertise and promote the subject property for sale or lease.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Develop marketing plan for subject property | 1.1 An information service on the sale or lease of property is provided to prospective purchasers and lessors 1.2 The benefits of property presentation are understood and confirmed with the principal 1.3 Relevant, accurate documentation is produced, and information is verified against the principal's instructions 1.4 Marketing strategy is reviewed and adjusted in consultation with the principal to enable agency services to be provided with the continued, informed consent of principals |
| 2. Promote and advertise property | 2.1 Advertising copy is produced which meets agreed budget and reflects agreed property and agency marketing strategies 2.2 Maximum impact in the selected market is achieved by the placement of timely advertising and the development of appropriate promotional material 2.3 Advertising copy and promotional material are reviewed for quality and effectiveness to enable appropriate adjustment to marketing strategies to be made |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 3 |

RANGE STATEMENT**Commercial factors affecting the choice of marketing strategy**

could include rising, steady or declining market performance; market perceptions of attractiveness of the property; availability of finance and interest rates; establishment/valuation fees, and timeframe for settlement.

| | |
|--|---|
| Statutory requirements regarding disclosure and documentation | vary from State to State within Australia. |
| Government fees payable | may vary from State to State. |
| Trust accounting processes and documentation | lodgement may vary from State to State. |
| Statutory requirements | include local government planning authority and zoning limitations. |
| Use of agency forms and standard procedures | may be influenced by the existence of standardised forms and procedures. |
| Marketing plans | may be written or verbal. Property marketed within the agency marketing profile or affecting this profile may need to be discussed with agency principals. The plan may market the property for rent or sale. |
| Promotional activities | may include advertising copy, window displays, multi-listing or sole agency promotions. |
| Types of databases | may be computer-based or print-based. |
| Codes of practice | include consideration of ethical practices and avoidance of secret commissions. |
| Types of property | include urban residential and rural residential properties. |
| Types of client | may be individuals or corporate bodies. |
| Size and availability of the property marketing budget | may be affected by the value of the property in the marketplace and fees and charges agreed in the agency contract. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of a property marketing and property sales assignment that closely resembles normal work practices.

Assessment of competency should include consideration of communication and negotiation skills used in marketing the subject property.

Evidence of competency may include:

- actual demonstrated performance on the job
- reports or computer generated documentation written by the candidate
- agency records
- letters of confirmation or verification from a relevant third party, including the vendor
- project reports/assignment results, including marketing and promotional kits produced by the candidate as an individual or as part of a team

Evidence may be obtained through:

- oral questioning
- practical demonstration of tasks and functions
- project material

Scope of application

The unit has application in all areas of the real estate industry.

Required workplace performance

Work is generally conditioned by the agency's existing marketing plan and vendor instructions.

Some judgement is required in the application of knowledge of the market, range of properties available.

Resources required for assessment include:

- suitable venue
- access to agency information

Underpinning knowledge

- Property appraisal and building regulations, including zoning
- Commercial property market conditions
- Advertising and copywriting techniques for marketing a property
- Real estate marketing
- Multimedia communication techniques
- Vendor motivation
- Agency policy and procedures

Underpinning skills

- Budgeting for a marketing campaign
- Copywriting and insertion of real estate advertisements
- Literacy and numeracy
- Computer literacy
- Communication, including use of sales techniques
- Office administration
- Business correspondence, including report writing

PRDRE15A**Unit Descriptor****Undertake property sale by private treaty**

This unit covers the sale of property using general real estate sales procedures and techniques. It does not include the sale of property by auction.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Screen buyer enquiries | <ul style="list-style-type: none"> 1.1 Enquiries from potential buyers are screened to enable buyer preferences and financial limits and capacity to buy to be ascertained 1.2 Factors likely to influence the purchase of properties are identified and used to confirm the buyer's intentions 1.3 Discussions with potential buyers are enhanced by the use of marketing aids to identify and match stated requirements with known listings 1.4 Potential buyers are assisted in making a decision to view properties using information obtained from buyers and vendors |
| 2. Undertake property inspection | <ul style="list-style-type: none"> 2.1 Inspections are arranged to suit all parties 2.2 Promotional material on the subject property is produced to describe salient sales features 2.3 Effective questioning techniques are used to clarify buyer expectations in relation to key features of the property on display |
| 3. Apply effective sales presentation techniques | <ul style="list-style-type: none"> 3.1 Factors affecting the successful conclusion of the sale are identified and addressed in the formulation of a sales strategy 3.2 Key decision-makers are identified to ensure that their needs and concerns are met in the presentation of properties 3.3 Appointments are made and properties presented according to the code of conduct defined in the agency customer service policy 3.4 Salient features of selected properties are matched to buyers' stated needs and motivations 3.5 Buyers are encouraged to clarify key aspects of the asset under consideration before a decision is made to purchase the property 3.6 Qualified prospects are recorded to provide an opportunity to maximise future marketing activities |
| 4. Decide on future contacts with prospects | <ul style="list-style-type: none"> 4.1 The nature of future contacts with prospects is assessed in the light of likely agency:client interaction to a given point in time 4.2 Business correspondence records are held on file to provide justification for the continuation or termination of contact, and are communicated, without prejudice, to the parties involved |
| 5. Maintain communication with vendor | <ul style="list-style-type: none"> 5.1 Vendor confidence in agency marketing activities is maintained through ongoing contact and correspondence 5.2 Communication is diarised to provide an accurate and objective record of progress reports to client |

PRDRE15A Undertake property sale by private treaty

- | | |
|---|--|
| 6. Submit offers and negotiate property sales | 6.1 Terms of offer are clarified and documented to ensure mutual understanding of the parameters of offers received from prospective buyers 6.2 Accurate advice on current market conditions is provided to inform vendors in relation to offers 6.3 Professional agency advice is provided to vendors which incorporates declared knowledge of buyers' motivations 6.4 Mutually agreed positions are confirmed in a manner which encourages commitment to the process 6.5 Documented, agreed price and conditions of sale are made accessible which provide an accurate record of agreement and meet agency and statutory requirements for finalisation of the property transaction |
| 7. Maintain client relationships | 7.1 Future business relations are established by mutual evaluation of vendors' and buyers' satisfaction with services provided 7.2 Business records and databases are updated to facilitate networking and informed marketing strategy planning |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

- Commercial environment** includes consideration of market trends, type of property and investment opportunities.
- Legislation** includes consideration of ethics relating to property sales, legislation relating to business contracts, tort and statutes affecting property transactions.
- Information available** includes information held by client, the agency and the salesperson's local and general knowledge of the property market as it affects the subject property.
- Category of client** may include individuals, corporate enterprises, private enterprises, government agencies, or government business enterprises.

Agency procedures may include procedures for compiling the sales file and recording the sale and the roles and responsibilities of principals and sales agents within the agency.

Geographic location may be rural or urban and include local and State regulations affecting the property. This may include zoning, and procedures for lodging contract documentation with settlement agent (solicitor or conveyancer).

Property inspections may include inspections by appointment only, or properties open to the public for inspection.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be undertaken as part of an overall assessment of performance in property marketing and sales.

Assessment of competency should include consideration of:

- research and sales communication skills
- administration of the property sales process
- demonstrated capacity to obtain and use legal and financial information in selling property
- Evidence of competency may be derived from:
- practical demonstrations under conditions that closely resemble normal work practices
- discussion of case studies
- documentation
- assignment reports, third party reports, explanatory notes, customer files
- client satisfaction surveys

Scope of application The unit applies to property sales.

Required workplace performance Work is undertaken with minimal supervision and may involve supervision of the work of others. It may also entail some discretion in the making of decisions and in negotiation with vendors and buyers.

Work is generally undertaken and supported by organisational structures and opportunities created by agency marketing.

Resources required for assessment include:

- audiovisual equipment
- relevant agency information
- a suitable venue

Underpinning knowledge

- Principles of property marketing
- Types of property and investment opportunities
- Property finance
- Business law and the law of contracts affecting property
- Business ethics
- Business administration
- Regulations affecting the sale of the property

Underpinning skills

- Planning and organising work, including time management
- Selling skills in relation to sale by private treaty
- Communication, including literacy, numeracy, negotiation and interpersonal communication techniques
- Administration of documentation process in relation to sale by private treaty
- Applied research, particularly of titles, local authority planning, sources of finance and purchase/sale costs

PRDRE16A**Unit Descriptor****Monitor sales process**

This unit covers the procedures involved in monitoring the lodgement of documents for the correct transfer of ownership required for a legal sale of property.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Plan for property settlement | <ul style="list-style-type: none"> 1.1 Settlement requirements are identified and checked with relevant parties to minimise misunderstanding or breaches of contract 1.2 Settlement within the contract's legal framework is ensured by liaison with legal practitioners and other parties representing the vendor and buyer 1.3 Contingency plans are prepared in consultation with relevant legal agents to avoid the possibility of one or more parties to the transaction being unable to fulfil contractual obligations |
| 2. Prepare documentation for agency disbursements | <ul style="list-style-type: none"> 2.1 Settlement financial transactions are checked for accuracy against contractual documentation, and agency fees are calculated and safeguarded during disbursement activities 2.2 Authorised agency disbursements are obtained within contractual, agency and statutory requirements 2.3 Financial systems are updated to reflect authorised transactions 2.4 Agency fees are calculated and safeguarded during disbursement activities 2.5 Due and proper attention is paid to obtaining required authorisations, signatures and identifications prior to disbursement |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT**Legal and contractual procedures**

may vary from State to State but work is generally undertaken in liaison with lawyers/solicitors and/or conveyancers.

Agency procedures

include:

- consideration of agency administration of financial and property records, including trust accounts and related statutory responsibility of individuals within the agency for data management in this area
- consideration of agency disbursements, commissions and updating of databases

Category of client

may be individual, corporate bodies, private enterprises or public enterprises.

Attendance at settlement

may not be required in all States and Territories.

EVIDENCE GUIDE**Context of assessment**

Assessment of this unit will normally be carried out as part of a broad assessment of property sales and management of the client relationship.

Assessment of competency should include consideration of:

- customer service skills
- job management and job role skills
- contingency management skills
- communication involving legal and financial agents
- management of data in client files and trust accounts

Evidence of competency may be derived from:

- documentation to do with sales settlement procedures
- practical displays of settlement negotiations
- supervisor and client surveys and reports
- agency databases
- discussions of case studies
- project and assignment material

Scope of application

Application of this unit is in property marketing and property sales in the real estate industry.

Required workplace performance

Work involves routine monitoring with the application of general knowledge of legal processes associated with completion of an exchange of contracts.

Resources required for assessment include:

- relevant venue and equipment, including access to personal computer databases

Underpinning knowledge

- Property sales settlement procedures
- Trust accounting in real estate
- Agency procedures and customer service protocols
- Principles of business law and relevant statutes affecting the sale of the subject property

Underpinning skills

- Communication, including interpersonal and business correspondence
- Administration, including database management
- Use of information technologies in the preparation of documents
- Quality assurance involved in monitoring the sales settlement process
- Work planning and management
- Customer service in relation to the sales process

PRDRE17A**Effectively manage property and account to landlord****Unit Descriptor**

This unit covers market reviews and management of tenancy renewals.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Negotiate with landlord strategies for maximising annual rental returns | 1.1 Landlords are kept accurately informed of rental market figures and market expectations 1.2 Rental returns are negotiated with lessors in relation to market changes and expectations 1.3 Agreed adjustments to rental charges are made and reported to landlord |
| 2. Plan for and manage tenancy renewals | 2.1 Property is inspected and an accurate report produced on property conditions and maintenance requirements 2.2 Property condition reports and rental details are provided to tenants prior to tenancy renewal 2.3 Tenancy renewal agreement is negotiated and conditions agreed to by all parties 2.4 All tenancy renewal documentation is prepared and provided to tenant and finalised according to legislative and agency guidelines |
| 3. Manage rental arrears to minimise financial loss to lessors | 3.1 Arrears lists are accurately prepared on a weekly basis according to agency procedures 3.2 Tenants in arrears are routinely followed up to obtain payment or vacant possession in accordance with landlord and legal requirements 3.3 Where necessary, claims against rental bonds are prepared and forwarded to the appropriate authority within specified timeframe of the outgoing property inspection |
| 4. Account to landlord on a regular basis for rental moneys collected | 4.1 Reports are accurately prepared on rental moneys collected or in arrears and reports provided routinely to landlord 4.2 Strategies for collection of rental arrears are discussed with landlord and agreed to by landlord prior to implementation of collection process |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|--|
| Agency procedures | include requirements for tenancy documentation, agency contract with the owner, records of transactions and agency procedures regarding advertising, key control, inspections and insurance. |
| Procedures and forms defined by statute | will affect work organisation and performance. Variations in statutory requirements occur between States. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted as part of an assessment of overall property management services.</p> <p>Assessment should include consideration of interpersonal and team communication skills and record-keeping of property management listings.</p> <p>Evidence of competency may be derived from:</p> <ul style="list-style-type: none"> • agency records • assignment and supervisor reports • discussions and practical demonstrations of use of procedures |
| Scope of application | This unit has application in property management in the real estate industry. |
| Required workplace performance | <p>The work requires a clear understanding and application of agency procedures and practices and the legislative framework.</p> <p>Work is likely to be under limited supervision. Responsibility for the work of others may be involved. Knowledge needs to be applied in a practical environment in depth, and utilise a broad range of skills. Variation to the type of property can introduce additional complexity. Judgement in the selection of methods and work organisation to achieve outcomes is often required.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to agency information • suitable venue and equipment, particularly computer equipment and associated software • access to a candidate's supervisor or clients, if relevant |
| Underpinning knowledge | <ul style="list-style-type: none"> • Local property knowledge • Knowledge of agency procedures • Relevant legislation |

Underpinning skills

- Functional literacy and numeracy
- Accuracy in print-based and computer-based record-keeping and data management
- Time management and work organisation, including problem-solving
- Interpersonal communication skills
- Team work in relation to managing property

PRDRE18A**Unit Descriptor****Unit Sector****Lease property**

This unit covers the administration of the leasing of property.

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Screen tenant enquiries | <ul style="list-style-type: none"> 1.1 Enquiries from potential tenant/lessee are screened to ascertain tenant/lessee preferences and financial limits and capacity to pay 1.2 Factors likely to influence the rent/lease of properties are identified and tenant/lessees intentions clarified 1.3 Discussions with potential tenants/lessees are undertaken using marketing aids to identify and match stated requirements with known listings 1.4 Information obtained from buyers and sellers is provided to potential tenants/lessees to influence their decision to view a property 1.5 Areas of dispute are analysed and evaluated according to agency procedures and market expectations to enable resolution of dispute |
| 2. Undertake property inspection | <ul style="list-style-type: none"> 2.1 Inspections are arranged to suit all parties 2.2 Promotional material is produced on the subject property to address salient rental features 2.3 Effective questioning techniques are used to clarify buyer expectations in relation to key features of the property on display and produce results |
| 3. Obtain and review tenancy applications | <ul style="list-style-type: none"> 3.1 Tenancy applications are reviewed to ensure they have been completed in a full and accurate manner, and that information provided is within legislative requirements 3.2 Applicants' references are checked and results recorded in accordance with agency procedures 3.3 Application processes are reviewed to ensure compliance with legislative requirements 3.4 Applications are referred to agency client for instructions with regard to giving keys 3.5 The selected applicant is notified and details recorded in agency systems |
| 4. Prepare and complete tenancy documentation | <ul style="list-style-type: none"> 4.1 Tenancy documentation is produced which meets statutory, agency and client requirements 4.2 Required government fees and duty are paid as stipulated 4.3 Security deposits are obtained, deposited and recorded as required by agency and statutory regulations 4.4 Documentation is served to relevant parties in the required timeframes |

- | | |
|---|--|
| 5. Record tenancy arrangements and prepare instructions for future records of transactions in the agency database | 5.1 The tenancy database is maintained in order to provide an accurate record of all property management contracts and actions required |
| | 5.2 Trust account transactions are accurately recorded to show moneys taken in and disbursements made in accordance with contract and statutory requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Agency procedures include requirements for tenancy documentation; agency contract with the owner ; records of transactions and agency procedures regarding advertising, key control, inspections and insurance.

Procedures and forms defined by statute will affect work organisation and performance. Variations in statutory requirements occur between States.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted as part of an assessment of overall property management services. Assessment should include consideration of interpersonal and team communication skills and record-keeping of property management listings.

Evidence of competency may be derived from:

- agency records
- assignment and supervisor reports
- discussions and practical demonstrations of use of procedures

Scope of application This unit has application in property management in the real estate industry.

Required workplace performance

The work requires a clear understanding and application of agency procedures and practices and the legislative framework.

Work is likely to be under limited supervision. Responsibility for the work of others may be involved. Knowledge needs to be applied in a practical environment in depth, and utilise a broad range of skills. Variation to the type of property can introduce additional complexity. Judgement in the selection of methods and work organisation to achieve outcomes is often required.

Resources required for assessment include:

- access to agency information
- suitable venue and equipment, particularly computer equipment and associated software

Underpinning knowledge

- Local property knowledge
- Knowledge of agency procedures
- Relevant legislation

Underpinning skills

- Functional literacy and numeracy
- Accuracy in print-based and computer-based record-keeping and data management
- Time management and work organisation, including problem-solving
- Interpersonal communication skills
- Team work in relation to leasing property

PRDRE19A**Unit Descriptor****Provide property management services**

This unit covers customer services and procedures and practices involved in the management of property under an agency contract.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Operate trust accounts for managed property clients | 1.1 Landlord trust accounts are established and operated within statutory and systems requirements of the agency 1.2 Required reports are prepared and audits conducted on landlord trust accounts |
| 2. Undertake risk management for managed properties | 2.1 Risk management is undertaken within the terms of the property management agreement with owners 2.2 Required insurance cover is maintained at all times 2.3 Contingency risks are regularly assessed and owners' advice sought for action |
| 3. Ensure security of managed properties | 3.1 Regular and planned inspections of managed property are undertaken 3.2 Property security measures are established within the terms of the property management agreement |
| 4. Maintain and protect condition of managed property | 4.1 Suitable tradespersons are selected and engaged according to agency needs and guidelines 4.2 Condition and usage patterns of managed property are monitored and reported to agency client at regular intervals 4.3 Service providers are selected on competitive basis 4.4 Service agreements are entered into with selected service providers 4.5 Service providers' performance is monitored to ensure efficient, cost effective outcomes 4.6 Property maintenance schedules are implemented in accordance with service agreement 4.7 Systems are maintained to record and action property maintenance requirements |
| 5. Plan for tenancy renewals | 5.1 Tenancy lease and renewal patterns for the agency are assessed and strategies developed to maximise agency and landlord benefits 5.2 Lease expiries are scheduled to ensure tenancy renewals are obtained prior to expiry dates as stipulated by landlord |
| 6. Ensure landlord's legal rights are protected | 6.1 Tenants are made aware of their rights and obligations under the tenancy agreement and their acceptance of the agreement is obtained 6.2 Agency client and tenant are advised where a breach of the lease by the tenant occurs 6.3 Agency client instructions are obtained and appropriate action taken in accordance with statutory regulations and agency client instructions |

7. Obtain vacant possession of managed properties
- 7.1 Notice is given to the tenant in accordance with agency client instructions and statutory requirements
 - 7.2 Legal procedures are followed to obtain legal possession
 - 7.3 Property inspections are conducted to meet agency, landlord and statutory requirements
 - 7.4 A satisfactory conclusion to the tenancy is reached by communication with the landlord and the tenant

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

- Statutory requirements** may vary from State to State but may involve common law, business contacts and property law surrounding agency contacts and tenancy agreements.
- Category of tenant** may be individual, private or public enterprises.
- Owner expectations** may be influenced by expected returns on rented property and willingness to maintain the property.
- Agency procedures** may include consideration of advertising budgets, expected fees, and attitudes to listing opportunities for the category of property.
- The property** may be:
- residential, commercial or rural
 - well maintained or in need of considerable ongoing maintenance

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of a property management services assignment that closely resembles normal work practices.

Assessment should include particular consideration of:

- interpersonal and team communication skills and record-keeping of property management listings and associated services
- budgets and financial record-keeping in relation to trust accounts
- record-keeping sufficient to satisfy contractual and trust account audit procedures
- Evidence of competency may be derived from:
 - agency listing records, property management reports
 - assignment and supervisor reports and owner surveys
 - discussions and practical demonstrations of use of procedures

Scope of application

The unit has application within the property management services area of the real estate industry. Work at this level is operational and done under supervision or according to agency guidelines.

Work can take place within the residential, commercial, industrial and rural property markets, body corporate/strata title sector.

Required workplace performance

Work is likely to be performed under broad guidance, involving some supervision of the work of others. Work may be both routine where undertaken within the broad parameters of agency practice, operational plans and budget constraints. Performance indicators derive from the agency strategic and operational plans.

Some judgement is required in managing contingencies and in negotiating solutions to problems with operatives outside the agency.

Resources required for assessment include:

- access to agency information
- suitable venue and equipment, particularly computer equipment and relevant software

Underpinning knowledge

- Principles of property management
- Building styles and faults
- Business and property law relating to the management of service contracts involving rental property
- Agency policy and procedures
- Residential tenancy legislation
- Mediation and court services available for dispute resolution
- Agency guidelines with regard to giving keys

Underpinning skills

- Communication skills: negotiation, problem-solving, report writing and accurate documentation
- Property inspection and reporting
- Contracts management
- Budgeting, costing and estimating in relation to property management services
- Records management in relation to property management services
- Computer database and spreadsheet in relation to property management services

PRDRE20A**Provide strata management services****Unit Descriptor**

This unit describes the provision of property management services for strata title properties. The work includes the preparation and presentation of formal reports to meetings of a body corporate responsible for the management of one or more properties owned by more than one person.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Implement owner corporation procedures and structures | <ul style="list-style-type: none"> 1.1 Corporate management procedures are established in accordance with owners' instructions and statutory requirements 1.2 Meetings are scheduled and run in accordance with owner and statutory requirements 1.3 Corporate risks are managed to minimise loss of income or equity derived from the property 1.4 Continuous suitable insurance cover is maintained, based on owner instructions 1.5 Accurate and timely reports are prepared as required 1.6 Disputes are arbitrated to the satisfaction of all parties 1.7 A property maintenance schedule is developed and implemented to ensure common property is maintained to owners' standards |
| 2. Maintain records | <ul style="list-style-type: none"> 2.1 Books of accounts are maintained to accurately reflect relevant transactions and collection of contributions 2.2 Reports provide an accurate and timely record of transactions and services provided 2.3 Statutory reporting requirements are met |
| 3. Execute agreements | <ul style="list-style-type: none"> 3.1 Service contracts are produced which provide an accurate record of facilities management and agency trust account disbursements 3.2 Approved actions are implemented within agreed timeframes and budgets 3.3 Adequate information for audit purposes is accurately recorded |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|--|
| Type of market activity | can take place within the residential, commercial, industrial and rural property markets. |
| Commercial environment | may include consideration of rates of return required by owner; and demand for leased and rented property. |
| Condition of the property | may be affected by rates of usage, turnover and maintenance policy and schedules. |
| Planned and agreed marketing activities | may include targeted and direct mail approaches, passive marketing, media campaigns, business newsletters, and use of mailing lists. |
| Budgets | may affect the level of maintenance and presentation of the property. |
| Available information | may include agency information, information provided by the owner or previous body corporate managers, and any other information available in the marketplace. It does not include information which is commercial-in-confidence. |
| Category of tenant | may include individuals, corporations, private and public enterprises; for the purpose of commercial, residential and long or short-term tenancy. |
| Statutory requirements | may include the need for formal meetings to be arranged and for formal records of meetings and financial transactions made on behalf of the owners/body corporate to be kept and lodged in accordance with the relevant legislation and related property statutes. |
| Category of owner | may include individuals, corporations and private or public enterprises where these are legal entities with deeds of title to the subject property - or who have power of attorney to act on behalf of legal owners. |
| Owner corporation meetings | include formal meeting procedures and record-keeping required by securities legislation, whether federal, State or Territory. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be carried out as part of an assessment of a property management assignment.

Assessment of competency should include evaluation of the individual's understanding of factors affecting property management, such as :

- the use of legal and financial information in the management of property under an agency agreement
- the importance of team and individual work efforts
- the public presentation of self
- regular, objective reports to owners and lessees
- the ability to equitably and accurately record information relating to the management of the subject property
- the ability to carry out and report on property inspections and to manage maintenance contracts and relationships with trades and service people
- the ability to administer moneys held in trust

Evidence of competency may be derived from:

- practical demonstrations, supervisor reports and customer surveys
- assignment records and reports
- case study discussions

Scope of application

The unit applies to the provision of property management services where the subject property or properties is managed by a committee accountable to one, or more than one, owner.

Note: In NSW the terminology has changed so that this type of management structure is now known as an owners corporation and individuals previously referred to as proprietor are now known as owners.

Required workplace performance

Work is conducted within the framework of agency plans with a service focus. Persons working within this area are required to apply a high level of practical industry knowledge and skill to achieve required outcomes and meet agency targets.

The various property types and environments may impact on the way work is performed and outcomes achieved.

Resources required for assessment include:

- suitable venue and computer equipment
- access to relevant agency records (which should be treated as commercial-in-confidence)

Underpinning knowledge

- Relevant legislation and statutes affecting body corporate services and strata title property management
- Principles of property management
- Financial management in relation to budgeting and bookkeeping
- Risk management, including insurances
- Business law relating to contracts and property management
- Use and application of statutory forms in property management
- Property trust accounting and bookkeeping

Underpinning skills

- Property inspections and property management techniques
- Interpersonal skills, including negotiation, business correspondence, team work
- Public presentation and presentation manners
- Creative problem-solving
- Contracts management
- Costing and budgeting
- Use of information technology for data management
- Meetings organisation and management
- Trust accounting and bookkeeping

PRDRE21A**Provide property development and marketing services****Unit Descriptor**

This unit covers assessing and maximising opportunities for new property development and associated property marketing services. It is not intended to cover project management required for construction oversight.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Identify development opportunities | 1.1 Relevant property information is collated and analysed 1.2 Development concepts are formulated from opportunities identified from an analysis of property information |
| 2. Assess viability | 2.1 Opportunities for development are assessed, in conjunction with allied property professionals, against known cost factors and market trends to determine their viability |
| 3. Approach potential clients | 3.1 Agency clients known to have an interest in the type of property development under consideration are approached 3.2 Information on the proposed development is presented in a manner which is not prejudicial to the interests of other parties 3.3 Information is presented in a manner which informs and motivates the potential client to enter into negotiations for property development and marketing services |
| 4. Discuss and clarify instructions with potential clients | 4.1 The potential client is advised on, aware of, and understands the services available in relation to the development of the property under consideration 4.2 The capability of the organisation for the assignment and any potential conflicts of interest are identified and steps taken to minimise the effect of these on the project 4.3 The scope of the project and the potential client's interest in the proposals are confirmed 4.4 Any relevant subcontracting arrangements, including quality assurance are negotiated to the satisfaction of relevant parties |
| 5. Determine and negotiate a fee | 5.1 A fee is negotiated, consistent with the scope of the project, the strategies agreed with the client, and the agency's pricing policy 5.2 Agreement reached on the fee is recorded for future reference |
| 6. Confirm assignment | 6.1 Confirmation is sufficient to provide an accurate legal record of agreement reached between the parties |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Nature and scope of the project

may include development projects, acquisitions, body corporate services, property leasing, and property marketing in relation to commercial, residential and specialist properties. It does not include the supervision of construction activities related to property development.

Category of client

may include financial institutions, individual and corporate property owners, government agencies, and trusts.

Project management contingencies **may include:**

- subcontracting arrangements, risk management strategies, contingency planning, time management, logistics, and financial management
- research and inspection activities, analysis of processes and work involved
- work with other professionals, including building inspectors, town planners, pest inspectors, quantity surveyors, consulting engineers, accountants, real estate agents, valuers, building contractors, architects and lawyers

Information available

includes information provided by the client, information available in the marketplace, information held by the agency, and local knowledge of relevant property markets.

Communication strategies used to negotiate the contract

may include formal tendering, networking, personal contact and the use of hard copy and information technologies.

Project management activities

will be consistent with the terms and conditions of the contract, unless these are varied with the informed consent of both parties and relevant stakeholders.

Related subcontractual arrangements

may include the commissioning of market studies, advertising, or other forms of mass communication in the property market.

EVIDENCE GUIDE**Context of assessment**

Assessment of this unit of competency will usually be conducted as part of an assessment of a comprehensive assignment that closely resembles normal work practices.

Evidence of competency may be inferred from observation, from documentation and from explanations demonstrating the individual's ability to find, check and use information in order to obtain and interpret client instructions.

Assessment should include specific consideration of the individual's understanding of legal, financial, social and administrative factors affecting the contractual relationship between the agency and the client - and other professionals likely to be involved in the project.

Scope of application

This unit has application in agency practice, as a specialised service area.

Required workplace performance

At the agency practice level, the unit requires work to be done without supervision. It will require the total expression of accountability and responsibility at law, including reasonable responsibility for the work of others in gathering data and coordination of working proposals.

Resources required for assessment include:

- suitable venue
- audiovisual equipment
- relevant codes of practice or agency policy and protocols

Underpinning knowledge

- Principles of project management in real estate agency practice and allied property services
- Legal requirements for the management of the project, including relevant statutes
- Principles of business law and property law which apply to the project
- Costing and budgeting for property development and marketing services
- Strategic planning for property development and marketing services

Underpinning skills

- Communication, including commercial negotiation, team and interpersonal communication
- Project planning, including work organising, risk management, time management, scoping and staging of proposals (logistics) and the application of performance indicators in project management
- Numeracy, including estimating, costing and budgeting of services and materials
- Problem-solving, use of information technology
- Tender preparation for property development and marketing services

PRDRE22A**Unit Descriptor****Present and explain property reports**

This unit describes the recognition and analysis of property styles and faults in order to advise clients of property values and conditions prior to listing, leasing or refurbishment.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Undertake property inspection | <ul style="list-style-type: none"> 1.1 The inspection is planned to satisfy agency and client requirements 1.2 Visual inspections of the inside and outside of the building and surrounds are conducted and overall impressions of structural and aesthetic features are noted 1.3 Obvious building defects are observed and noted for future reference 1.4 Periodic inspections are scheduled as required to maintain condition of property |
| 2. Define the main features of building styles in the market as they affect the subject property | <ul style="list-style-type: none"> 2.1 Architectural and construction styles affecting the value of the subject property are identified 2.2 Variations from 'pure' styles and associated modifications to the original building and surrounds are noted 2.3 Current market value is estimated in light of the effect any modifications may have on the market value of the property 2.4 Information is collected which will provide a useful and concise record for preparation of the property condition report |
| 3. Prepare a property condition report | <ul style="list-style-type: none"> 3.1 Information collected during the inspection and additional researched information is compiled as a clear, concise and accurate record of current condition |
| 4. Analyse cost benefits of property improvements | <ul style="list-style-type: none"> 4.1 Preventive or enhancement measures are researched to provide a range of options for consideration 4.2 Possible structural or aesthetic defects requiring professional opinion or advice are identified and noted for discussion with the client 4.3 A report is produced which addresses key client concerns and provides a useful reference and decision-making tool 4.4 Overall condition of the property is estimated in relation to current and predicted property values in the relevant market |
| 5. Present and discuss condition report | <ul style="list-style-type: none"> 5.1 The information is presented in a clear and logical fashion and is understandable to the client 5.2 Immediate and long-term options are clearly presented and cost benefits of each option explained to the client's satisfaction 5.3 A report is produced which assists the client make sound and objective decisions about the immediate and long-term value of the subject property 5.4 Agency services related to improving the condition of the property are explained to the client's satisfaction |
| 6. Take instructions | <ul style="list-style-type: none"> 6.1 Client instructions are obtained and recorded for future action |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---------------------------------------|--|
| Property market | includes residential, commercial, industrial, business or rural, and specialised properties in a rising, steady or declining market. |
| Building styles and faults | may include any of the known architectural styles and several hybrid styles common in the Australian property market. |
| Faults | may include construction faults, refurbishments and aesthetic faults, including those in the gardens or surrounds of the property. |
| Property inspection reports | may be developed from standard agency templates or customised to suit the particular requirements of the property or agency client. |
| Client expectations and intent | may include sale, lease or property redevelopment, in both the long and short term. |

EVIDENCE GUIDE

Context of assessment

This unit should be assessed in conjunction with, or with reference to, unit PRDRE37A Perform and record property management activities and transactions, so that any overlap in competency can readily be given Recognition of Prior Learning (RPL).

Assessment will usually be undertaken as part of an overall assessment of the candidate's ability to identify building styles and faults and deliver a condition report.

Assessment should include consideration of:

- how access to the building is obtained
- the method of inspection
- the quality and presentation of the report

Evidence required includes:

- documented inspection reports
- reports conducted and prepared for a minimum of two different types of property
- supervisory or client reports, comments or recommendations

Scope of application

The unit applies to all service areas in the real estate industry.

Required workplace performance

Work may be routine, involving the use of templates or form documents. It may also require enquiries and initiative in uncovering hidden faults and defects in buildings. The work will be guided by the scope of the agency/client contract, and the agency marketing, property management and sales policies.

Resources required for assessment include:

- documented inspection reports
- suitable property to inspect
- access to clients/supervisors where relevant
- case studies
- assessment instruments

Underpinning knowledge

- General knowledge of architectural styles and common building faults in residential and commercial buildings less than seven storeys high
- Property market values
- Common structural design faults

Underpinning skills

- Identification of building styles and faults
- Report writing
- Presentation skills, including communication
- Analytical and problem-solving
- Team work in relation to presenting and explaining property reports

PRDRE23A**Unit Descriptor****Maintain agency:client relationship**

This unit deals with the formal and informal relationships involved in acting for an agency client in transactions concerning two or more parties.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Take and act on instructions | 1.1 Instructions are accurately interpreted to cover the required transactions and are used to provide clear guidelines for action 1.2 Transactions are accurately recorded and maintained in the agency diary 1.3 The capacity of the agency to provide the required services is confirmed |
| 2. Maintain a diary system | 2.1 Appropriate diary system is identified and used daily to provide for all agency recording needs 2.2 Diary is implemented for recording of information and data for effective time management and legal implications 2.3 Diary is accurately maintained and secured |
| 3. Delegate responsibility where appropriate | 3.1 Responsibility for contracts is delegated to reflect agency staff competency and agreed levels of agency authority 3.2 Client support is obtained for delegations of responsibility |
| 4. Maintain quality of transactions | 4.1 Communication and reporting arrangements are clearly understood and the relevance of the agency relationship within agreed contractual limits is maintained 4.2 Agency transactions on behalf of the client are performed which are consistent with agreed agency customer relations policy 4.3 Client satisfaction is actively monitored and services adjusted to maintain client satisfaction with level of services provided 4.4 Matters requiring clarification or negotiation are resolved to the satisfaction of the parties concerned 4.5 Potential and actual conflicts of interest are addressed to avoid breaches of contract |
| 5. Resolve outstanding matters | 5.1 Client service delivery concerns are addressed within the parameters of the agency:client contract 5.2 Practical solutions are negotiated between the parties which are reflected and agreed in contract adjustments 5.3 Steps are taken to dissolve the agency:client relationship which follow due process and reflect the requirements of contract law |
| 6. Maintain agency:client records | 6.1 Correspondence files are maintained in order to be accessed by authorised personnel and provide an accurate and objective record of agency:client transactions |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Client expectations

will generally be confined to the parameters of agency contract provisions for sale or management of property. Client expectations may vary, depending on the economic climate affecting the market and expectations of returns on property transactions.

The role of the service provider

will be constrained by the level of authority delegated by the agency principal, and functional duties and responsibilities within the agency.

Contractual obligations

will generally be defined by the scope and intent of the contract, but may involve common law contractual obligations established in the course of negotiations.

EVIDENCE GUIDE

Context of assessment

Assessment of competency in relation to this unit will usually be conducted as part of a critical incident role-play. It may also involve case studies drawn from practical experiences. Assessment will need to be conducted in a manner which protects the identities and reputations of actual persons.

Assessment using critical incidents and role-plays should provide for adequate debriefing of candidates and assessors after the assessment is concluded.

Evidence of competency may be derived from combinations of the following:

- sample contracts, including business correspondence
- criteria for assessment of factors to be considered in role-plays, where these are agreed in advance of the assessment taking place
- videotapes of critical incident role-plays
- customer surveys
- supervisor reports

Scope of application

This unit applies to all areas of the real estate industry.

Required workplace performance

Work is routine and confined by the scope of the agency:client contract. Multiple contracts may be involved where third parties are involved in transactions.

Resources required for assessment include:

- access to a suitable venue
- case studies
- agency information, provided this is treated as commercial in-confidence
- business correspondence and sample contracts

Underpinning knowledge

- Agency protocols and styles of management
- Principles of contract law, including common law
- Duty of care in relation to clients
- Industry ethics in relation to clients
- Agency customer service policy
- Agency general policies and procedures

Underpinning skills

- Communication skills, including negotiation and conflict mediation
- Analytical and problem-solving skills involved in sorting out issues and finding practical, legal solutions
- Client records management

PRDRE24A**Unit Descriptor****Prepare asset refurbishment plan**

This unit includes the need for ongoing liaison with agency clients in situations where leased property requires the services of subcontractors.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Establish need for refurbishment | <ul style="list-style-type: none"> 1.1 Property inspection reports are used to advise client of the cost benefits associated with property refurbishment 1.2 Identified client needs and potential risks and opportunities involved with the refurbishment are confirmed through the preparation of a refurbishment plan 1.3 Work required to be done is costed and budgets are developed for client consideration and approval |
| 2. Confirm client requirements | <ul style="list-style-type: none"> 2.1 Plans for refurbishment management are developed consistent with client requirements and agreed budgets 2.2 Risk factors are identified and steps taken to protect agency and client interests 2.3 Service schedules and budgets are negotiated, implemented, monitored and activities adjusted to achieve outcomes required by the client and agency 2.4 The refurbishment project team is formed and roles and responsibilities in relation to agreed outcomes agreed and documented 2.5 Unbiased tender processes are implemented and suitable subcontractors appointed consistent with the client's specifications |
| 3. Implement refurbishment management services contract | <ul style="list-style-type: none"> 3.1 Team input to project objectives is coordinated through the agency to the satisfaction of subcontractors and the client 3.2 Performance in relation to timelines and budgets is regularly monitored 3.3 Necessary variations or adjustments are negotiated with subcontractors and the client, and agreed outcomes documented 3.4 Refurbishments are completed according to plan and within budget and time constraints, to client and statutory requirements 3.5 Reports and administrative procedures are completed to agency and client specifications |
| 4. Evaluate and report on refurbishment outcomes | <ul style="list-style-type: none"> 4.1 Client satisfaction with refurbishment is determined and recorded to agency specification 4.2 Contingencies affecting the project, and strategies used to manage these successfully, are recorded 4.3 Processes involved in reaching objectives are evaluated for quality, added value and contribution to further refurbishment management opportunities 4.4 Team and individual contributions to the project are recorded for future reference |

5. Secure agency fees
- 5.1 Agency fees for services provided are documented and deducted from client account
- 5.2 Transaction records which are auditable are maintained to provide an accurate record of actions taken on client's behalf

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|---|---|
| Level of client involvement with the project | may be negotiated and recorded within the scope and conditions agreed in the contract. |
| Scope of the refurbishment project | may vary from the commissioning of tradespersons to repaint, recarpet or repair minor damage to premises, through to large-scale refurbishment of commercial property. |
| Scope of the refurbishment required | will affect the formality of structures, operations and management strategies used to coordinate the project. |
| Information management | may include the use of print-based and multimedia technologies. |
| Information to be provided | may vary from tradesperson's quotes on the cost of services and materials through to cost:benefit analyses, based on the effect of property improvement on rental/sales returns. |
| Industry ethics | include consideration of real and potential conflicts of interest involved in the commissioning of services and trades in areas where an ongoing contractual arrangement may already exist with agency preferred providers. |
| Legal structure | covers all contracts for service. |
| Property markets in which the project is managed | may include residential, commercial, industrial or rural property markets. |

Quality assurance may be achieved through group or administrative techniques, consideration of technical performance benchmarking, and customer evaluation of outcomes.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted as part of an assessment of an assignment that closely resembles normal work practices.

Assessment of competency should include consideration of the preparation of the plan and involvement of client and team members. It should also consider the quality of process management, coordination of activities and resources and leadership in evaluating, reviewing and adjusting activities to ensure a successful outcome to the project.

Assessment should also include consideration of the individual's understanding of factors affecting project management.

Evidence of competency may be obtained from:

- practical demonstrations
- client surveys and supervisor reports
- case study discussions
- evaluation of assignment and project management reports and associated documentation, including correspondence and audiovisual material
- peer (team) evaluation

Scope of application This unit has application in property management in the real estate industry.

Required workplace performance Work is non-routine and undertaken under limited guidance. Defined responsibilities and accountabilities will exist. Significant judgement is required in management of large projects.

Resources required for assessment include:

- access to the contract and any written plan
- a suitable venue and audiovisual equipment
- criterion-referenced material and relevant guides
- codes of practice

Underpinning knowledge

- A working knowledge of project management principles, including logistics, financial management, business law, venture management, capital and equity markets and marketing
- The impact of statutory, regulatory requirements which may affect the project, including local regulations for development, building codes and by-laws, public and professional liability, industry professional standards

Underpinning skills

- Planning and organising asset refurbishment
- Tender preparation for asset refurbishment
- Risk analysis and management of asset refurbishment
- Costing, estimating and budgeting asset refurbishment
- Applied research techniques in asset refurbishment
- Written and verbal presentation
- Team work and related communication skills
- Problem-solving in relation to asset refurbishment

PRDRE25A**Unit Descriptor****Respond to property enquiry**

This unit has application in over-the-counter and telephone enquiries and information management relating to listed properties and agency services.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Identify nature of the enquiry | <ul style="list-style-type: none"> 1.1 Details of the enquiry are gathered and recorded 1.2 The enquiry is prioritised within the resource capabilities of the agency 1.3 Key sources of information within the agency are identified |
| 2. Investigate for appropriate responses | <ul style="list-style-type: none"> 2.1 Enquirer's queries and contact details are checked and accurately recorded 2.2 Relevant information is identified and sourced 2.3 Accuracy of information is qualified and checked 2.4 Additional information is noted and clarified 2.5 Third parties are informed and information accurately recorded |
| 3. Provide information | <ul style="list-style-type: none"> 3.1 Information provided is relevant and satisfies enquirer's information needs 3.2 Information is recorded in order to assist in the marketing of the agency, listed properties and agency services |
| 4. Follow up on information enquiry | <ul style="list-style-type: none"> 4.1 Enquiries are recorded for agency use as service 'leads' and to enable relevant market analysis 4.2 Appointment opportunities are referred to appropriate staff for follow-up and scheduling in diaries 4.3 Additional information requirements are recorded and used to source further information 4.4 Work allocations derived from enquiries are made within agreed agency protocols |
| 5. Process client complaints to ensure the goals of the agency are met | <ul style="list-style-type: none"> 5.1 The nature of the complaint is clarified and recorded, and an apology is made if appropriate 5.2 Options for resolution of complaint are identified and explained to the client, or when necessary complaint is referred to manager/office principal 5.3 Complaint is promptly referred to appropriate staff to be resolved by negotiation with client 5.4 Associated documentation is completed 5.5 Any problems encountered with agency procedures are correctly identified and referred to relevant person for action |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|------------------------------|--|
| Type of enquiry | may include lease enquiries, information about agency services in relation to specific property, property management, current and planned real estate developments, contract administration, and sales or property management. |
| Research | includes information on agency database and printed information held by industry and community groups. |
| Communication of need | may be by e-mail or other electronic method, by memo, or verbal. |
| Relevant bookings | include appointments for visits, meetings, travel, inspections or listings. |
| Files | could be electronically or manually maintained. |

EVIDENCE GUIDE

| | |
|---------------------------------------|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted in conditions that closely resemble normal work practices for a person with responsibilities identified in the unit.</p> <p>Evidence of competency will be derived from relevant documentation and practical demonstrations involving at least three different types of query and supervisory/client reports.</p> |
| Scope of application | This unit is relevant across all areas of real estate agency service. |
| Required workplace performance | The work will generally be routine, but may involve some initiative within broad parameters established by agency and property marketing strategies. |

Resources required for assessment include:

- assessment instruments
- multimedia equipment
- relevant forms/documents for recording queries
- agency case studies
- suitable venue

Underpinning knowledge

- Agency operations and processes
- Work allocation procedures
- Sources of information/researched data
- Information management systems
- Duty of care and applicable statutory law

Underpinning skills

- Use of computer databases to respond to enquiries
- Good telephone communication skills
- Ability to screen calls to establish purpose of query
- Strong interpersonal communication
- Applied research to access internal and external property information

PRDRE26A**Unit Descriptor****Conduct property sale by auction**

This unit covers the preparation, conduct and completion of the sale of property by auction. It includes administration, advertising, pre-auction communication and conduct of the auction.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------|---|
| 1. Prepare for auction sale | 1.1 Auction marketing procedures, which may include prepayment of promotion, advertising costs and related administrative expenses, location and auction day procedures, are agreed in advance with vendor 1.2 Auction documentation which is consistent with vendor's instructions and marketing plan is used to manage the auction program 1.3 Appropriate and reliable descriptions of the subject property are provided before and during the auction |
| 2. Conduct auction | 2.1 Questions asked by interested parties are answered or referred to informed sources 2.2 The auction is professionally conducted to establish the optimum price possible from the buyers in attendance, consistent with the auction strategy 2.3 The auction is conducted in a manner consistent with the agency marketing strategy and property sales legislation |
| 3. Complete auction sale | 3.1 Accurate sales data is compiled which reflects auction outcomes and can be used in follow-up procedures 3.2 Appropriate records of attendance or interest are compiled to expand agency contact lists of potential clients identified through the auction process |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|-------------------------------|--|
| Information available | may include access to agency property sales manuals, files, auction documentation, relevant codes of practice, local planning, and financial information - including information about pricing and terms of trade. Information may be held in print form or on computer databases. |
| Commercial environment | may include: <ul style="list-style-type: none"> • state of the property market, availability of finance and investment opportunities • consideration of volume of trade affecting property sales and range of properties on the market |
| Agency procedures | may include methods for managing auctions, advertising, channels of communication, and security arrangements affecting crowd control. |
| Category of client | may include individuals, corporations, public or private enterprises. |
| Tools of trade | may include auction boards, signs, stickers, display boards and audiovisual equipment. |
| Legislation | may include statutory requirements affecting the sale of property by auction. |
| Property 'passed in' | Properties may fail to attract reserve prices, in which case underbidders are followed up. |

EVIDENCE GUIDE

| | |
|------------------------------|---|
| Context of assessment | <p>Assessment of this unit may be conducted as part of an overall assessment of property marketing and sales or as a stand-alone exercise.</p> <p>Evidence of competency should include assessment of the individual's understanding of underpinning knowledge and skill, and a practical demonstration of the actual conduct of an auction.</p> <p>Evidence of competency may be derived from:</p> <ul style="list-style-type: none"> • practical demonstration • documentation, including auction files, sales reports and contracts prepared • marketing and promotional kits developed for the subject property • case study discussions • project assignment reports and supervisor reports • multimedia and audiovisual equipment |
|------------------------------|---|

Scope of application

This unit has application in property marketing and property sales in the real estate industry

Required workplace performance

Work is performed under the instructions of the vendor and within the constraints of an agency agreement and statutory requirements. Judgement will be exercised in the management of the auction process and in reaching agreement on a price which meets the agreed terms and conditions of auction.

Resources required for assessment include:

- multimedia technology, including computers and relevant software
- agency information or access to relevant databases
- suitable venue
- auction equipment
- appropriate statutory forms and vendor instructions

Underpinning knowledge

- Auction and property sales consulting techniques
- Real estate advertising
- Sales marketing and presentation
- Legislation affecting property selling, including public liability, trade practices, fair trading, and agency and occupational licensing requirements

Underpinning skills

- Group communication techniques, including voice projection and dramatic presentation
- Voice control
- Costing and pricing in relation to conducting a property sale by auction
- Selling
- Work planning and management
- Use of information technologies

PRDRE27A**Unit Descriptor****Monitor chattel auction/clearing sale**

This unit covers the preparation, conduct and completion of the sale of chattels by auction. It includes administration, advertising, pre-auction communication and conduct of the auction.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Prepare chattel auction inventory | <ul style="list-style-type: none"> 1.1 Auction/clearing sale strategy is developed which takes into consideration the vendors' instructions and results of pre-auction marketing 1.2 Inventories of reserve and non-reserve items are produced which include pricing requirements 1.3 Auction/clearing sale marketing and promotional aids are provided which reflect agreed agency marketing strategy and legal requirements |
| 2. Maintain security of chattels and auction site during auction | <ul style="list-style-type: none"> 2.1 Effective goods control and security systems are used to monitor the movement of goods and transactions entered into throughout the auction 2.2 Relevant statutory and agency occupational health and safety requirements are implemented to prevent injury to staff and members of the public |
| 3. Monitor and record sales and collect payments | <ul style="list-style-type: none"> 3.1 Items presented in the prepared inventory and auction/sale strategy are made available for pre-auction reviews 3.2 Effective bidder security systems are maintained to prevent or eliminate theft and non-payment 3.3 Potential buyers are identified and the auction/sale conducted to produce the optimum price possible from the buyers in attendance, consistent with the auction strategy |
| 4. Secure agency fee | <ul style="list-style-type: none"> 4.1 Receipting systems are followed which provide an accurate record of agency entitlements 4.2 Agency fees are accounted for and are deducted from payments to the client 4.3 Auction/sale progress is monitored against the auction strategy to enable client instructions to be sought and acted on 4.4 Completed sales are documented to provide an accurate record of auction outcomes, including agency fees and disbursements to clients 4.5 Levels of bidder interest in future auctions/sales or specific categories of chattels area are ascertained and used in predicting demand chattel pricing 4.6 Steps are taken to foster and maintain contact with potential buyers |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|-------------------------------|--|
| Information available | may include access to agency property sales manuals, files, auction documentation, relevant codes of practice, local planning, and financial information - including information about pricing and terms of trade. Information may be held in print form or on computer databases. |
| Type of property | This unit may form a foundation unit for the development of units relating to auctioning in specialised areas, for example art, antiques, equipment and livestock. |
| Commercial environment | may include: <ul style="list-style-type: none"> state of the property market, availability of finance and investment opportunities consideration of volume of trade affecting property sales and range of properties on the market |
| Agency procedures | may include methods for managing auctions, advertising, channels of communication, and security arrangements affecting crowd control. |
| Category of client | may include individuals, corporations, public or private enterprises. |
| Tools of trade | may include auction boards, signs, stickers, display boards and audiovisual equipment. |

EVIDENCE GUIDE

Context of assessment

Assessment of this unit may be conducted as part of an overall assessment of property marketing and sales or as a stand-alone exercise.

Assessment of evidence should also establish the individual's understanding of auction dynamics.

Evidence of competency may be derived from:

- practical demonstrations
- documentation, including auction files, sales reports and contracts prepared
- marketing and promotional kits developed for the subject property
- case study discussions
- project assignment reports and supervisor reports
- multimedia and audiovisual equipment

Scope of application

This unit has application in property sales in the real estate industry.

Required workplace performance

Work is performed under the guidance of the vendor and within the constraints of an agency agreement and statutory requirements. Judgement will be exercised in the management of the auction process and reaching agreement on a price which meets the agreed terms and conditions of auction.

Resources required for assessment include:

- multimedia technology
- agency information or access to relevant agency databases
- suitable venue
- auction equipment
- appropriate statutory forms and vendor instructions

Underpinning knowledge

- Property sales consulting techniques
- Chattels advertising
- Sales marketing and presentation
- Legislation affecting property selling, including public liability, trade practices, fair trading, and agency and occupational licensing requirements

Underpinning skills

- Group communication techniques, including voice projection and dramatic presentation
- Voice control
- Costing and pricing of chattels
- Selling
- Work planning and management
- Use of information technologies

PRDRE28A**Unit Descriptor****Maintain trust account**

This unit expands on units relating to bookkeeping and financial management to clarify the distinction between audits of accounts kept for normal agency business practices and audits for trust account management purposes.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Establish trust account record-keeping systems | <ul style="list-style-type: none"> 1.1 Trust account requirements are clearly produced to provide an accurate and separate record of funds managed in trust for audit purposes 1.2 Documentation required for accurate trust account keeping is produced to comply with key accounting principles 1.3 Books of accounts are maintained to provide an accurate record of agency transactions on behalf of clients within a given period 1.4 Audit and security arrangements are maintained to prevent fraud and provide adequate protection for client funds held in trust |
| 2. Secure cash disbursements | <ul style="list-style-type: none"> 2.1 Functions and responsibilities are kept separate to reflect agency responsibilities for cash disbursement security 2.2 Security systems in cash management are implemented to minimise the risk of loss through negligence or fraud 2.3 Disbursements to and from trust accounts are authorised and managed within agreed agency protocols |
| 3. Establish, supervise and control staff activities in relation to trust account transactions | <ul style="list-style-type: none"> 3.1 Lines of authority are clearly explained to staff and monitored on a day-to-day basis 3.2 Privacy of agency transactions on behalf of clients is protected through authorised access controls 3.3 Entries to trust accounts are checked against authorisation records to ensure compliance with agency and statutory requirements 3.4 Discrepancies in trust account records are checked and, when necessary, reported to the licensee |
| 4. Maintain records of trust account transactions | <ul style="list-style-type: none"> 4.1 Records are maintained to enable them to be conveniently and properly audited 4.2 Periodic financial reports are prepared and discussed with clients to ensure their continued accuracy 4.3 Corrective action to remedy confirmed discrepancies is performed when relevant 4.4 Security risks for safekeeping of records and funds on agency premises are identified and remedial action taken |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 3 |

RANGE STATEMENT

| | |
|--|--|
| Financial standards | include Australian accounting standards and legislative requirements defined in statutes as amended from time to time. |
| Bookkeeping practices | include the separation of agency, personal and trust account records. |
| Legal standards | are restricted to agency obligations for accuracy of account entries and security of financial systems and agency records associated with trust account entries. |
| Functional authority for bookkeeping entries | may be delegated to authorised personnel, but legal responsibility for accuracy of transactions remains with the agency principal(s). |
| Records | may be kept manually or on electronic financial data management systems. |
| Documents which act as reference points for bookkeeping entries | include listing authorities, sales contracts, property management contracts, insurance policies, receipts and invoices. |

EVIDENCE GUIDE

Context of assessment

Evidence of competency may be derived from documentation required for auditing of trust account management procedures.

Particular attention should be paid to assessing the following:

- overarching principles of trust accounting
- fiduciary duties and responsibilities for trust account management and associated legal compliance requirements
- factors which distinguish trust accounts from general agency accounts
- systems design, including fraud control; risk management and supervision of trust account entries and disbursements
- methods of identifying and reporting discrepancies
- internal control mechanisms in system specifications

Scope of application

The unit applies to agency principals with responsibility for maintenance of trust account records and client funds held in trust.

Required workplace performance

The work involves legal responsibility for monetary transactions carried out on behalf of an agency client. The work is generally routine and performed within legal and financial guidelines.

Resources required for assessment include:

- case studies
- agency documentation
- suitable venue and access to relevant equipment and software
- relevant statutes and codes of practice
- relevant supervisory or peer reports

Underpinning knowledge

- Principles of trust accounting
- Fiduciary duties, including rights, obligations and responsibilities when dealing with funds held in trust
- Features which distinguish trust accounts from general agency or personal, principal accounts
- Legislative requirements

Underpinning skills

- Bookkeeping in relation to trust account management
- Supervision in relation to trust account management
- Risk management in relation to trust account management
- Methods of identifying discrepancies in periodic financial reports
- Work and time management
- Information management
- Use of information technologies applied to trust account management

PRDRE29A**Use and maintain a property information database****Unit Descriptor**

This unit covers the use and maintenance of property-related information databases in the agency. It is not concerned with the decision to acquire, develop or create the agency's database(s).

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Determine and access appropriate property database(s) | 1.1 Parameters of database enquiry are identified 1.2 Relevant input variables are determined and used for accuracy of output 1.3 Data options are reviewed and analysed |
| 2. Retrieve relevant property information and produce reports | 2.1 Input variables are tested for sensitivity and accuracy of information 2.2 Property information report is produced with relevant data 2.3 Report is produced to conform to the agency's required style and format 2.4 Final report is reviewed and checked for accuracy |
| 3. Upgrade and enter property information | 3.1 Appropriate software database is identified and edited where necessary 3.2 Additional property data is used to update the relevant files 3.3 Relevant changes are entered and checked against original information for accuracy 3.4 Records are maintained and made secure in line with the agency's requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

Data sources

may include:

- publications, journals, computer data files, statutes, statistical summaries, policy statements, and media reports
- local, State and Commonwealth government documents and registers

Database components

may include:

- market information, sales, rental and leasing rates, construction costs, occupancy rates, operating costs, statutes
- judgments, depreciation schedules and information on affectations (e.g. easements, transmission lines), contaminated sites, flood prone sites, heritage sites, native title developments and main road developments
- maps, plans, and aerial and satellite photographs

EVIDENCE GUIDE

Context of assessment

Competency may be inferred from demonstrated use of the database.

In assessing candidates, particular attention needs to be given to the usefulness of the database and the ability of the candidate to research and remedy any deficiencies in the database.

Scope of application

This unit applies to the use and maintenance of a range of databases to support the operations of a real estate agency.

Required workplace performance

Within the general guidelines, the work involves selection of appropriate database(s) from a range of generic and property-related options and the responsibility for the maintenance and effectiveness of the database(s).

Underpinning knowledge

- Computer software and relevant packages
- External and inherent features of property types
- Sources of property transactions
- Procedures for using office equipment and technology

Underpinning skills

- Computer skills
- Maintaining records and databases
- Information gathering
- Filing
- Planning and organising activities in relation to maintaining an information database
- Verbal and written communication
- Problem-solving in relation to maintaining an information database
- Interpersonal skills

PRDRE30A**Unit Descriptor****Unit Sector****Implement personal marketing plan**

This unit covers personal and professional presentation to clients.

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------------|---|
| 1. Maintain a professional image | 1.1 Dress code and personal grooming are maintained in accordance with agency requirements 1.2 Work areas are kept tidy and uncluttered 1.3 Contact is maintained with clients to promote confidence in the agency and in personal ability to deliver the quality of service required |
| 2. Address client requirements | 2.1 Client requirements are identified and understood 2.2 Personal behaviour and interaction with clients is within the bounds of accepted professional ethics and community standards 2.3 Communication with client is clear and unambiguous and satisfies the client's need for information |
| 3. Build credibility with clients | 3.1 Client expectations for reliability, punctuality and appearances are addressed to the satisfaction of all parties 3.2 Possible causes of client dissatisfaction are identified, dealt with, and recorded in accordance with agency procedures 3.3 Client is kept advised of progress in marketing, listing, managing or selling the subject property 3.4 Client confidentiality is maintained in accordance with professional ethics |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 1 |

RANGE STATEMENT**Dress code**

may vary according to market, category of client and their ethnic or cultural background and expectations.

| | |
|---|---|
| Changes to client needs and expectations | may be detected in a range of ways, including through review of customer service contact, discussion with the client, emerging industry trends, and provision of new agency services. |
| Work instructions | may be conveyed in writing, verbally or electronically. |
| Professional ethics | are those agreed by the relevant professional, industry or trade organisation and ratified by the relevant consumer protection authority-either nationally or at a State/Territory level. |
| Client | may include all members of the public or be a specific person or agency with whom a contractual agency relationship exists. |
| Appropriate action | may include implementation of required changes, improvement in presentation of self in a public domain, or clarification of client needs and instructions. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Evidence of competency is best obtained by observing activity in the field and reviewing the provision of quality customer service under normal industry operating conditions. If this is not practicable, observations in realistic environments may be substituted.</p> <p>Evidence should include a demonstrated capacity to:</p> <ul style="list-style-type: none"> • apply professional and business ethics in a competitive market • successfully deal with a variety of client/agency interactions, including in a cross-cultural or multi-cultural context <p>Evidence used to assess competency could include:</p> <ul style="list-style-type: none"> • discussion of client briefs • role-plays • case studies • client satisfaction surveys • supervisor reports or client references |
| Scope of application | <p>This unit is relevant to activity within the retail, commercial, industrial and residential property market sectors.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to an appropriate venue for assessment purposes • agency information, procedures, protocols, etc. |
| Underpinning knowledge | <ul style="list-style-type: none"> • Personal grooming appropriate to the real estate industry and agency's requirements • Professional ethics • Customer service • Personal marketing strategies |

Underpinning skills

- Interpersonal communication
- Time management
- Telephone technique
- Record-keeping
- Accuracy in maintaining documentation related to agency's work

PRDRE31A**Unit Descriptor****Unit Sector****Negotiate effectively with landlords and tenants**

This unit covers negotiation skills specific to the real estate industry.

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Interview landlords and tenants to establish needs and expectations at all stages of tenancies | 1.1 Clear and open discussion is held with landlords and tenants to clarify questions and identify issues to be resolved |
| 2. Communicate with landlords and tenants to reach a desired outcome | 2.1 Negotiation is completed on desired outcome, and agreements reached with landlords and tenants that are within agency and legislative guidelines 2.2 As necessary, follow-up communication or reports are provided to landlords and tenants to confirm any adjustments required to conditions of agreement |
| 3. Manage potential and real disputes between landlords and tenants | 3.1 Areas of dispute are analysed and evaluated according to agency procedures and market expectations to enable resolution of dispute 3.2 Further negotiation and clarification of terms and conditions of lease of property is carried out until agreement is reached to the satisfaction of all parties |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT**Agency procedures**

include requirements for tenancy documentation; agency contract with the owner; records of transactions; and agency procedures regarding advertising, key control, inspections and insurance.

Procedures and forms defined by statute

will affect work organisation and performance. Variations in statutory requirements occur between States.

EVIDENCE GUIDE

Context of assessment

Assessment of this unit of competency will usually be conducted as part of an assessment of overall property management services.

Assessment should include consideration of interpersonal and team communication skills and record-keeping of property management listings.

Evidence of competency may be derived from:

- agency records
- assignment and supervisor reports
- discussions and practical demonstrations of use of procedures

Scope of application

This unit has application in property management in the real estate industry.

Required workplace performance

The work requires a clear understanding and application of agency procedures and practices and the legislative framework.

Work is likely to be under limited supervision. Responsibility for the work of others may be involved. Knowledge needs to be applied in a practical environment in depth, and utilise a broad range of skills. Variation to the type of property can introduce additional complexity. Judgement in the selection of methods and work organisation to achieve outcomes is often required.

Resources required for assessment include:

- access to agency information
- suitable venue and equipment, particularly computer equipment and associated software
- access to a candidate's supervisor, clients, if relevant

Underpinning knowledge

- Local property knowledge
- Knowledge of agency procedures

Underpinning skills

- Functional literacy and numeracy
- Accuracy in print-based and computer-based record-keeping and data management
- Time management and work organisation, including problem-solving in relation to landlord and tenant problems
- Interpersonal communication skills
- Team work in addressing landlord and tenant problems
- Negotiation skills

PRDRE32A**Maintain and protect conditions of rented properties****Unit Descriptor**

This unit covers all aspects of property maintenance and advice.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Conduct regular property inspections | 1.1 Tenants are informed of the agency and legislative guidelines for inspection of properties, and anticipated timelines for inspections are agreed in advance 1.2 Managed properties are thoroughly inspected at regular intervals according to agency guidelines, and any change to the property condition is discussed with the tenant |
| 2. Analyse property condition with respect to market expectations and legislative requirements | 2.1 Property is thoroughly inspected and condition is analysed against market expectations of normal wear and tear and legislative requirements for the maintenance of leased property 2.2 Discussion is held with the tenant as to the maintenance of the property and any repairs/replacements required under legislation 2.3 Negotiation is conducted with the property owner regarding repairs/replacements that are required under legislation or requested by the tenant and agreement reached on action to complete work |
| 3. Monitor and manage contacts for ongoing maintenance to ensure compliance with legislation and maintenance of property condition | 3.1 Accurate records are kept of contacts for property maintenance and repairs so that reliable work can be completed without delay 3.2 Repairs and maintenance are managed in accordance with client's instructions and agreed requirements for repairs/replacements, and according to legislation 3.3 Reports of property condition are supplied to client to indicate conditions and expected maintenance requirements and to indicate completion of work |
| 4. Advise landlord on ways of protecting the asset value of property through systematically planned preventive maintenance programs | 4.1 Landlord is advised by regular report of expected maintenance requirements and expenditure, so that property condition is prevented from unnecessary deterioration 4.2 Accurate records of maintenance programs are kept up to date and the landlord regularly informed of property condition |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|-------------------------------|--|
| Commercial environment | includes consideration of market expectations and type of property. |
| Legislation | includes consideration of ethics relating to property maintenance and legislation relating to business contracts. |
| Information available | includes information on maintenance contractors and standards of property maintenance. |
| Category of client | may include individuals, corporate enterprises, private enterprises, government agencies, and government business enterprises. |
| Agency procedures | may include procedures for monitoring property maintenance and reporting. |
| Geographic location | may be rural or urban, and include local and State regulations affecting the property. |
| Property inspections | may include inspections by appointment only. |

EVIDENCE GUIDE

Context of assessment

This unit should be assessed in conjunction with, or with reference to, unit PRDRE37A Perform and record property management activities and transactions, so that any overlap in competency can readily be given Recognition of Prior Learning (RPL).

Assessment of this unit of competency will usually be undertaken as part of an overall assessment of performance in property maintenance.

Assessment of competency should include consideration of:

- research and communication skills
- administration of the property maintenance process
- demonstrated capacity to obtain and use legal and financial information

Evidence of competency may be derived from:

- practical demonstrations under conditions that closely resemble normal work practices
- discussion of case studies
- documentation
- assignment reports, third party reports, explanatory notes, customer files
- client satisfaction surveys

Scope of application

The unit applies to leased property maintenance.

Required workplace performance

Work is undertaken with minimal supervision and may involve supervision of the work of others. It may also entail some discretion in the making of decisions and in negotiation with owners and contractors.

Work is generally undertaken and supported by organisational structures.

Resources required for assessment include:

- audiovisual equipment where available
- relevant agency information
- a suitable venue

Underpinning knowledge

- Principles of property management
- Building styles and faults
- Business and property law relating to the management of service contracts involving rental property
- Agency policy and procedures
- Residential tenancy legislation
- Insurance needs for tradespeople

Underpinning skills

- Communication skills: negotiation, problem-solving, report writing
- Property inspection and reporting on rented properties
- Contracts management of rented property
- Budgeting, costing and estimating in relation to rented properties
- Records management for rented properties
- Computer database and spreadsheet

PRDRE33A**Unit Descriptor****Coordinate property inspection**

This unit covers arranging property inspections and conducting open-for-inspection demonstrations.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Arrange property inspections in line with marketing strategy | 1.1 Vendors are informed of requirements for presenting the property 1.2 Inspection times are advertised, promoted and known to potential vendors 1.3 Inspection register is prepared and maintained during and after inspections |
| 2. Conduct open-for-inspection demonstrations | 2.1 Property is prepared for inspection 2.2 Access and exit to the property is maintained within accepted and agreed guidelines 2.3 Comments made during inspections are noted and communicated to vendors 2.4 Documentation is prepared according to legal requirements 2.5 Security issues are addressed in line with agency guidelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 3 |
| Working with others and in teams | - |
| Using mathematical ideas and techniques | - |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT**Vendor requirements**

may limit access to specific times and under specified conditions.

Agreed advertising and inspection times

may include weekdays or weekends and peak traffic periods.

Agency procedures

- may include consideration of personal and public safety and security of the property before, during, and after, inspections
- may be influenced by local ordinances and legislation limiting access to agreed or specified times

Level of interest in property may be influenced by the position, price or potential of the property within prevailing property markets.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted in conditions that closely resemble normal work practices for a person with responsibilities identified in the unit.

Evidence used to assess competency could include role-plays, case studies, or the conduct of an open-for-inspection event.

Scope of application This unit is relevant to activity within the retail, commercial, industrial and residential property market sectors.

Resources required for assessment include:

- access to agency information on relevant property

Underpinning knowledge

- Vendor requirements in relation to property inspection
- Prevailing rental market expectations
- Agency procedures for inspections and any checklists required
- Legislation affecting tenancy rights e.g. covering access to and presentation of the property to potential consumers

Underpinning skills

- Communication, including interpersonal negotiation
- Time management in relation to organising property inspections
- Thorough documentation of inspection content and results

PRDRE34A**Unit Descriptor****Maintain key register**

This unit covers accuracy, security and authorisation issues when maintaining a key register.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Ensure accuracy of entries | 1.1 Entries are made in the key register which cover the location of the property and the time and date on which keys were first received |
| 2. Maintain security of register and of keys | 2.1 Security procedures are maintained according to agency practice and property owner authorisation 2.2 Keys are coded and secured to prevent unauthorised access to properties 2.3 Access to keys is managed within accepted agency guidelines |
| 3. Record deposits and identify people authorised to have access to keys | 3.1 Authorised access to keys and conditions under which keys are made available is recorded 3.2 Records are entered according to accepted agency practice 3.3 Keys are released to authorised persons on the settlement of a sale or lease, at the direction of owner or their representative 3.4 Non-returns are reported to authorised personnel and action taken to prevent unauthorised access to properties |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT**Type of register**

may be print or electronic.

Access conditions

may be defined by owner or by agency policy and procedures.

Authorisation required

may be defined by the type of property and surrounding security arrangements.

Type of keys may be electronic or mechanical.

Type of identification includes driver's licence, passport, or other form of statutory documentation accepted as legal proof of identify.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted in conditions that closely resemble normal work practices for a person with responsibilities identified in the unit.

Evidence used to assess competency could include:

- correctly completed workplace documents, including key directory and lost/found logs or files
- correctly maintained data entry systems

Scope of application This unit is relevant to activity within the retail, commercial, industrial and residential property market sectors.

Resources required for assessment include:

- access to relevant agency information and documents

Underpinning knowledge

- Agency key register procedures
- Access restrictions to locations/areas within the subject property
- Security systems for keys

Underpinning skills

- Literacy
- Data entry skills
- Communication of directions in relation to security of keys and key register

PRDRE35A**Communicate effectively and accurately with clients****Unit Descriptor**

This unit has application in over-the-counter and telephone responses in all aspects of client communication.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Establish an appropriate level of rapport with the client | 1.1 Empathy is demonstrated by the use of effective listening skills and open body language 1.2 Client entitlements and responsibilities are explained where necessary 1.3 Client conflicts are dealt with in a professional manner, while adhering to organisational procedures and guidelines |
| 2. Follow the appropriate processes for handling initial client enquiries | 2.1 Client needs for assistance or information are thoroughly explored and immediate processes for resolution are determined 2.2 Information need is assessed and accurate verbal or written information is clearly supplied 2.3 As necessary, interview appointment time is arranged, preparatory information is provided and interview preparations are completed 2.4 Formal and informal information is gathered and appropriate notes are taken for file |
| 3. Employ effective strategies for managing difficult or aggressive client behaviour | 3.1 Difficult or aggressive client behaviour is diffused by using a range of appropriate skills 3.2 When clients' expectations are not met, communication is completed by providing information in a firm and considerate manner |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 2 |
| Working with others and in teams | - |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|------------------------------------|---|
| Type of client enquiry/need | may include lease enquiries, information about agency services in relation to specific property, property management, current and planned real estate developments, contract administration, sales or property management, or conjunctional agents. |
| Research | includes information on agency database and printed information held by industry and community groups. |
| Communication of need | may be by e-mail or other electronic method, by memo, or verbal. |
| Relevant bookings | include appointments for visits, meetings, travel, inspections or listings. |
| Files | could be electronically or manually maintained. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of this unit of competency will usually be conducted in conditions that closely resemble normal work practices for a person with responsibilities identified in the unit.</p> <p>Evidence of competency will be derived from relevant documentation and practical demonstrations involving at least three different types of query and supervisory/client reports.</p> <p>Recognition of Prior Learning (RPL) will be granted where units covering the same communication functions have been successfully assessed.</p> |
| Scope of application | This unit is relevant across all areas of real estate agency service. |
| Required workplace performance | The work will involve some initiative within broad parameters established by agency and property marketing strategies. |
| Resources required for assessment include: | <ul style="list-style-type: none"> • assessment instruments • multimedia equipment • relevant forms/documents for recording queries • agency case studies • suitable venue |
| Underpinning knowledge | <ul style="list-style-type: none"> • Agency operations and processes • Work allocation procedures • Sources of information/researched data • Information management systems for communicating effectively and accurately with clients |

Underpinning skills

- Use of computer databases to communicate with clients
- Telephone skills
- Interpersonal communication
- Applied research to access internal and external property information
- Ability to screen calls to establish purpose of query

PRDRE36A**Process marketing material****Unit Descriptor**

This unit covers preparing, checking and submitting marketing material for publication.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Prepare copy for advertising and promotional campaigns | 1.1 An advertising and promotion outline is prepared for approval by the vendor/landlord 1.2 Copy is prepared that describes and promotes key features of the subject property 1.3 Copy is produced that includes appropriate headlines, body copy and call to action, and is of an appropriate length 1.4 Pictures, sketches and graphics featured in the copy are appropriate to the media selected by the vendor/landlord 1.5 Language is used that is appropriate for the medium selected |
| 2. Check and submit copy for publication | 2.1 Terms, timelines and cost of publication are confirmed 2.2 Content is checked and corrections made where appropriate |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 2 |

RANGE STATEMENT**Method of promotion and media selected**

is governed by the agency:vendor contract.

Methods of promoting properties

include newspapers, newsletters, seminars, and signboards.

Property being marketed

may be retail, commercial, industrial, or residential.

Medium in which copy may appear

may be print-based (newspapers, newsletters, posters), Internet, radio, or television.

| | |
|---|---|
| Costs | may vary depending on the vendor/landlord's budget and the advertising medium selected. |
| Method of calculating costs | may be by tender, by pricelist or by fixed agency service fees. |
| Preparation methods | may be original or rely on the use of prepared templates. |
| Enterprise policy and procedures | may vary, depending on local property, real estate consumer legislation or administrative practice. |

EVIDENCE GUIDE

| | |
|---|---|
| Context of assessment | <p>Evidence of competency may be inferred by reviewing copy prepared for publication in either a print or an electronic medium.</p> <p>Evidence used to assess competency should include:</p> <ul style="list-style-type: none"> • short-answer questions • case studies • discussions • role-plays • portfolios of material • client satisfaction surveys • evidence of results in market recognition of copy, or take-up rates |
| Required workplace performance | The functions outlined above are generally performed under supervision. |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to appropriate company marketing materials: newspapers, brochures and other promotional material • multimedia equipment, including computers and appropriate software, if relevant • assignment specifications, vendor contracts, agency documentation, or supervisor's reports |
| Underpinning knowledge | <ul style="list-style-type: none"> • Methods of promoting properties • Vendor requirements in relation to marketing property • Agency policy and procedures for managing the preparation of copy within an agreed marketing budget • Comparative benefits of print and electronic-based media in marketing property |
| Underpinning skills | <ul style="list-style-type: none"> • Functional literacy and numeracy • Negotiation and interpersonal communication skills • Descriptive skills in relation to marketing materials • Lay-out and design skills in relation to marketing materials |

PRDRE37A

Perform and record property management activities and transactions

Unit Descriptor

This unit covers property management at the operational level. It is done under supervision or according to agency guidelines.

Unit Sector

Real estate

ELEMENT

PERFORMANCE CRITERIA

- | | |
|---|---|
| 1. Check in tenants and provide tenancy reports | 1.1 Correct procedures are followed and accurate and appropriate advice is provided to new tenants checking into property 1.2 Pre- and post-tenancy reports are accurately produced according to agency guidelines and legislative record-keeping requirements |
| 2. Establish and maintain tenant/landlord documentation and files | 2.1 All relevant information from tenant/landlord is verified 2.2 Tenant/landlord documentation is completed and filed according to agency procedures in secure files |
| 3. Prepare tenancy agreements in accordance with legislative requirements | 3.1 All tenancy documentation is clearly explained to the tenant 3.2 Tenancy documentation is produced in accordance with legal requirements and agency policy |
| 4. Prepare managing agents agreements in accordance with legislative requirements | 4.1 All landlord documentation is clearly explained to the landlord 4.2 Landlord documentation is produced in accordance with legal requirements and agency policy |
| 5. Record tenant/landlord transactions on agency database | 5.1 All verified transactions are accurately recorded on agency database as completely as possible 5.2 Details of tenant/landlord information are regularly adjusted and updated to ensure reliable records are kept |
| 6. Receive, record and lodge security deposits (bonds) and rent | 6.1 All moneys are received and accurately recorded in agency files and documentation 6.2 All security deposits are secured and forwarded to statutory authorities within specified timeframe 6.3 Incident reports are followed up with appropriate personnel where necessary |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

Agency procedures include requirements for tenancy documentation, agency contract with the owner, records of transactions and agency procedures regarding advertising, key control, inspections, and insurance.

Procedures and forms defined by statute will affect work organisation and performance. Variations in statutory requirements occur between States.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted as part of an assessment of overall property management services. Assessment should include consideration of interpersonal and team communication skills and record-keeping of property management listings.

Evidence of competency may be derived from:

- agency records
- assignment and supervisor reports
- discussions and practical demonstrations of use of procedures

Scope of application This unit has application in property management in the real estate industry.

Required workplace performance

The work requires a clear understanding and application of agency procedures and practices and the legislative framework.

Work is likely to be under limited supervision. Responsibility for the work of others may be involved. Knowledge needs to be applied in a practical environment in depth, and utilise a broad range of skills.

Variation to the type of property can introduce additional complexity. Judgement in the selection of methods and work organisation to achieve outcomes is often required.

Resources required for assessment include:

- access to agency information
- suitable venue and equipment, particularly computer equipment and associated software
- access to a candidate's supervisor and clients, if relevant

Underpinning knowledge

- Local property knowledge
- Knowledge of agency procedures
- Relevant legislation

Underpinning skills

- Functional literacy and numeracy
- Accuracy in print-based and computer-based record-keeping and data management, in relation to property management
- Time management and work organisation, including problem-solving, in relation to performing and recording property management activities and transactions
- Interpersonal communication skills in relation to performing and recording property management activities and transactions
- Team work in relation to performing and recording property management activities and transactions

PRDRE38A**Unit Descriptor****Maintain equipment and facilities**

This unit covers procurement of office space, equipment and other 'tools of trade' and the subsequent maintenance and, when necessary, replacement of facilities and equipment necessary for efficient agency practice.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Acquire equipment and facilities | 1.1 Needs for equipment and facilities are accurately identified and assessed in conjunction with agency management 1.2 Options for supply are researched, and costings are analysed and agreed prior to ordering equipment 1.3 Facilities and equipment are obtained within budget and with minimum adverse impact on cash flow |
| 2. Monitor and maintain effective use of facilities and equipment | 2.1 Efficiency and effectiveness of facilities and equipment is monitored over time to allow efficient business decisions to be made 2.2 Optimum asset usage is ensured |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 3 |
| Using technology | 3 |

RANGE STATEMENT**Choice of facilities and equipment**

may be affected by agency location, nature of the services provided, number of staff, and available funds.

Ergonomics

may be influenced by building design, work flow, and nature of services provided by staff.

Availability of facilities and equipment

may be affected by suppliers and distributors, pricing, distribution, and intellectual property rights.

Maintenance schedules may be affected by statutory requirements, including occupational health and safety, workers compensation, public liability, and other forms of asset and agency insurance.

Maintenance schedules may also be affected by agency policy and practices in relation to depreciation and amortisation of assets.

Individual and collective preferences, fashion and sense of aesthetics may influence choice.

EVIDENCE GUIDE

Context of assessment Assessment of this unit of competency will usually be conducted as part of a management assignment.

Evidence of competency should include criteria dealing with the preparation and justification of a strategy to manage the acquisition and maintenance of agency facilities and equipment over periods of time consistent with agency budgeting and strategic planning initiatives.

Assessment should give particular consideration to the basis on which choices are made and of the individual's understanding of the budgetary, human and aesthetic elements of procurement.

Evidence of competency may be derived from:

- practical demonstrations, including audiovisual demonstrations
- researched assignments and reports
- agency documentation
- supervisor's reports

Scope of application This unit applies in the management of a real estate agency.

Required workplace performance At the agency principal level, the unit requires work to be performed without supervision. It will require accountability and responsibility for the work of others involved in the procurement process. In larger organisations, the final choice of facilities may depend on endorsement by key stakeholders.

Resources required for assessment include:

- a suitable venue, including workstation and computer equipment and software
- assessment instruments
- commercial information on relevant equipment and facilities

Underpinning knowledge

- Financial management
- Administration and office systems
- Ergonomic, office layout and work design principles
- Agency purchasing and maintenance policy and procedures
- Risk minimisation and management techniques in relation to contract documentation and forms
- Business law affecting contracts

Underpinning skills

- Planning and organising work and maintenance schedules
- Budgeting and costing in relation to preparing contract documentation and forms
- Communication, including commercial negotiation, in relation to preparing contract documentation and forms
- Application of aesthetics in office design and layout
- Team work and supervision in relation to preparing contract documentation and forms
- Record-keeping in relation to preparing contract documentation and forms
- Use of spreadsheets and related software applications for preparing contract documentation and forms

PRDRE39A**Unit Descriptor****Prepare and execute documentation**

This unit describes how to prepare and present documents in the practice of conveyancing within the real estate sales and leasing industry.

This unit is similar to unit FNBCNV05A endorsed in the Finance Training Package but has been customised with different outcomes.

Unit Sector

Real estate

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Prepare documentation | <ul style="list-style-type: none"> 1.1 Parties, property and all relevant terms agreed to by the parties are described 1.2 Legal and government requirements are fulfilled in the correct manner 1.3 Documentation is completed accurately 1.4 Documentation is prepared within required timeframe |
| 2. Present documentation for execution | <ul style="list-style-type: none"> 2.1 Advice given to the client is accurate and complete 2.2 Client is advised of rights, obligations and responsibilities ensuing from the legal relationship 2.3 Document is signed and witnessed in accordance with legal requirements and is properly executed 2.4 Document is certified if necessary 2.5 All relevant processes and searches are completed 2.6 Documentation is checked to ensure it is completed accurately and in accordance with procedures within the required timeframe |
| 3. Manage collateral/third party involvement | <ul style="list-style-type: none"> 3.1 Execution and return of documentation by other parties is arranged 3.2 Execution by third parties is checked to ensure compliance with legislative constraints 3.3 Completion of actions by other parties is checked to ensure timelines are met |
| 4. Draft, adapt and construct documents to meet client needs and instructions | <ul style="list-style-type: none"> 4.1 Document purpose is identified 4.2 Document is designed to conform to all formatting requirements 4.3 Documentation is drafted or adapted to meet client needs 4.4 Document is produced which achieves intended purpose 4.5 Content information is checked to ensure it is clear, accurate and unequivocal 4.6 Completed document is checked for consistency with purpose and legislative requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

Agency procedures include requirements for sales documentation, disclosure forms, and agency contract with the owner, records of transactions and agency procedures regarding searches, inspections and insurance.

Procedures and forms defined by statute will affect work organisation and performance. Variations in statutory requirements occur between States.

EVIDENCE GUIDE

Context Application of this unit of competency will vary with the legislative requirements of each State and methods of document preparation and presentation which depend on the technology available in the work environment.

Competency shall be assessed in conditions that closely resemble normal work practices, within the bounds of safety, and in accordance with work procedures.

Assessment should include those aspects of the key competencies that are consistent with the work environment of this unit.

Assessment of this competency must be performed in relation to a range of documentation which must include, but is not limited to, contracts, special conditions, agency agreements and disclosure documents.

Critical aspects

In providing evidence of consistent achievement of this unit's workplace outcomes within the context of AQF level 4, the following critical aspects of performance should be observed:

- complies with legislation and common law in document preparation
- completes work within timelines
- checks documents for relevancy and currency
- implements current government procedures completely
- ensures that document achieves intended purpose efficiently
- ensures that document achieves conveyance in accordance with the client needs.

Context of assessment

Assessment of this unit of competency may be undertaken as a stand-alone assessment or as part of an assessment of general agency sales and marketing techniques, depending upon the extent to which various State legislations permit salespersons to complete the documentation.

Assessment should include consideration of vendor satisfaction with the quality of information and service provided and the potential for repeat business.

Evidence of competency could be derived from a number of fields of practice (residential sales, commercial sales and business sales) or from one area only, if the agency specialises in that type of service.

Tools for assessment of competency could include:

- case study discussions
- agency documentation, including listings, work plans, marketing reports, searches and vendor questionnaires
- supervisor and peer reports
- assignment reports
- multimedia materials

Scope of application

This unit has application in property sales and leasing in the real estate industry.

In some States, legislation permits real estate personnel to prepare documentation. Therefore the application of this unit of competency relates to the preparation of required documentation.

Documentation includes both that which has been previously identified and that which is prescribed.

Documentation should make consideration of the following:

- Aboriginal land rights
- ASC requirements
- associations
- auctions
- banking
- bankruptcy
- bills of sale
- building regulations
- business licenses
- business law
- commercial tenancies
- company and incorporated associations
- consumer protection
- consumer credit
- contract
- copyright
- crown land
- dealing with interests in land
- deceased estates
- easements and restrictive covenants
- environment
- Fair Trading
- family law
- fences
- finances and securities
- food and health
- foreign investment
- guardianship
- heritage
- house contracts and guarantee provision
- insurance
- land acquisition
- land division
- landlords and tenants
- law of succession
- licensing of conveyancers
- limitation of actions
- local government
- local, State and federal government taxes
- mining
- minors
- mortgage financing
- native title
- old system land

- pastoral properties
- personal property
- permissive occupancy
- planning
- positive covenants
- powers of attorney
- privacy
- property inspections and searching
- rates and taxes
- real estate agents
- retail leases
- roads
- real property
- registration of dealings with land
- revenue law
- sale of goods
- stamp duty
- strata titles and bodies corporate
- torts
- trade practices
- trusts
- workers liens

Required workplace performance

Work is likely to be under limited supervision. Responsibility for the work of others may be involved. Knowledge needs to be applied in a practical environment in depth and utilise a broad range of skills. Variation to the type of property can introduce additional complexity. Judgement in the selection of methods and work organisation to achieve outcomes is often required.

Resources required for assessment include:

- a suitable venue
- documentation, including any of those documents listed above
- access to the candidate's immediate supervisor or peers, if relevant

Where information relating to the employing agency is used in the assessment process, this should be treated as commercial-in-confidence.

Underpinning knowledge

- Relevant legislation and common law
- Land Titles Office requirements
- Fiduciary duties and responsibilities relating to document preparation ethics

Underpinning skills

- Examination of documents and legislation
- Liaison/consultation with others in relation to preparing and executing documentation
- Presenting information in a variety of forms
- Planning and organising work
- Operating appropriate technology
- Drafting documents
- Time management
- Record-keeping and file maintenance

PRDSSA11A**Unit Descriptor****Administer agency activities**

This unit covers all aspects of office administration in a stock and station agency, including information management and front desk customer service.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Establish and maintain office facilities | <ul style="list-style-type: none"> 1.1 Agreed office layout designs are used to facilitate work flow and communication 1.2 Office facilities are maintained in an attractive manner, consistent with business objectives 1.3 Facilities and equipment are procured and maintained within agreed agency budgets and procedures 1.4 Agreements and contracts are negotiated which meet agency requirements and protect agency interests 1.5 Facilities and equipment are procured which meet the growth and performance needs of the agency as defined in operational plans and budgets 1.6 Inventories are controlled to ensure stock levels are maintained within demand requirements and agency budget 1.7 Office systems are implemented and maintained in line with office procedures and consistent with business objectives 1.8 Maintenance of equipment and facilities is done on schedule |
| 2. Provide agency support services | <ul style="list-style-type: none"> 2.1 Documents are prepared in a timely and accurate manner in accordance with agency standards and statutory requirements 2.2 Agency records are accurately maintained and provide accessible records of agency transactions 2.3 The security of agency information is ensured to protect agency and client interests 2.4 Records management procedures are implemented to ensure critical information is accessible to stakeholders 2.5 Meetings are scheduled, planned and conducted to achieve desired outcomes 2.6 Schedules and rosters are prepared to ensure the efficient operation of the agency 2.7 Telecommunication systems are provided to enable rapid and timely communication within the agency and with clients/customers 2.8 Client and customer contact is courteous and professional 2.9 Agency standards and procedures are prepared where required to enhance agency operations and systems 2.10 Computer databases and files are installed and maintained to meet agency business objectives 2.11 Records management procedures are implemented 2.12 Information is shared within the agency to support informed decision-making |

PRDSSA11A Administer agency activities

- | | |
|--|---|
| 3. Organise meetings, rosters and procedures | 3.1 Meetings are scheduled, planned and conducted to achieve desired outcomes |
| | 3.2 The outcomes of meetings are communicated to relevant stakeholders |
| | 3.3 Schedules and rosters are prepared to ensure the efficient operation of the agency |
| | 3.4 Client and customer contact is courteous and professional, reflecting agency customer service policies and procedures |
| 4. Maintain channels of communication | 4.1 Information is shared within the agency to support informed decision-making |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

- Systems** used may be either manual or computerised, including telecommunications equipment, diaries, mailing systems, and general records of account.
- Data collection** may include filing systems, registers, listings and rent rolls, professional diaries, meetings bookings, and records of meetings.
- Statutory and community bodies** may include Australian Meat and Livestock Corporation, Meat Industry Authorities, Australian Quarantine Inspection Service, Department of Primary Industry and Energy, RSPCA, Australian Wool Exchange, Australian Wheat Board, Australian Dairy Authority, Foreign Investment Review Board, Rural Lands Protection Boards, and Department of Agriculture.
- Relevant legislation** may include federal, State and local government.
- Standards and codes of practice** may include those relating to occupational health and safety, public health, public liability, franchising and licensing agreements, consumer protection, banking, equal opportunity, anti-discrimination, industry codes of conduct, auctioneering acts, credit act, taxation, property stock and business agent, and common law duty of care.

EVIDENCE GUIDE

Context of assessment

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- assessment of the individual's underpinning knowledge and skills

Resources required for assessment include:

- access to industry assessors
- access to an office environment
- relevant codes of practice covering management of a stock and station agency business
- access to relevant legislation dealing with business operations, including taxation, fair trading, privacy, credit, local government, auctioneering, licensing, franchising, trade practices and equal opportunity

Underpinning knowledge

- Business law principles
- Trust accounting
- Trade practices
- Taxation
- General office routines
- Financial management practice and principles
- Codes of practice
- Administrative routines and practice
- Computers where a manual system is not used
- Franchise and marketing group audit requirements
- Bookkeeping
- Security requirements
- Accounting standards
- Ergonomics
- Customer service
- Statutory requirements relating to:
 - agency practice
 - consumer protection
 - public liability/insurance and other forms of risk management
 - privacy legislation

Underpinning skills

- Business written and verbal communication
- Supervision in relation to agency activities
- Research in relation to agency activities
- Problem-solving in relation to agency activities
- Interpersonal
- Analytical
- Numerical
- Financial
- Computing
- Purchasing and procurement in relation to agency activities
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities
- Record-keeping

PRDSSA17A**Unit Descriptor****Establish and expand client base**

This has application in the areas of retaining and expanding a client base in all areas of activity in an agency.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Service existing client base | 1.1 Existing client base is examined on a regular basis to enable a list of contacts to be prepared and actioned in accordance with marketing plan 1.2 Opportunities for servicing clients are identified and actioned in a timely manner 1.3 Client situations are assessed to enable target groups to be determined |
| 2. Prepare strategy to expand client base | 2.1 Current and future trends are assessed to formulate a strategy for expanding the client base 2.2 Existing sources of information are accessed so that potential clients can be identified 2.3 Strategy is documented and advised to relevant personnel so that contacts can be made 2.4 Follow-up action is determined and acted upon in a comprehensive manner |
| 3. Canvass for new clients | 3.1 A schedule of calls is prepared to facilitate effective use of servicing time 3.2 Calls are made in a punctual manner 3.3 Unannounced calls are answered in a courteous and non-invasive manner 3.4 Calls are recorded to facilitate follow-up action 3.5 Follow-up action is determined and acted upon in a comprehensive manner 3.6 Discussions are relevant to identified business needs of the client |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Opportunities | may include new sale and purchase proposals which suit client background and history, and special promotions. |
| Existing sources of information | may include networks, referrals, trade contacts, personal knowledge, and feedback from existing clients. |
| Calls | may be prearranged or unsolicited. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to franchising and licensing agreements, industry codes of conduct, property stock and business agent, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • developing, documenting and implementing a strategy for establishing and expanding the client base, including justification for the strategy |
| Scope of application | This unit applies to all agency operational areas. |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors |

Underpinning knowledge

- Background and history of clients
- Current information on position of clients
- Market conditions
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation
- Problem-solving
- Interpersonal

PRDSSA18A**Apply market knowledge to service business opportunities****Unit Descriptor**

This unit has application for assessing performance in relation to service business opportunities for the agency.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---------------------------------------|--|
| 1. Review current trends | 1.1 Information on current trends is reviewed to ensure industry knowledge is current and relevant 1.2 Relevant information is filed to facilitate future research 1.3 Networks are used to gain industry knowledge and views on current trends |
| 2. Review forward projections | 2.1 Information on forward projections is gathered and analysed on a regular basis 2.2 Relevant information is collated and disseminated to interested parties to assist in decision-making |
| 3. Use information to secure business | 3.1 Information is sorted, analysed and formulated to ensure that it is relevant to the organisation's requirements 3.2 Market variations are monitored so that forward purchases and sales can be offered to clients 3.3 Information is documented to facilitate its use for advertising and image building |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT**Livestock**

may include cattle, sheep, horses, goats, alpacas, deer, and ostriches.

Information

may be found in press publications, industry journals and reports, radio reports, internal publications, government statistics and reports, and internal statistical data.

| | |
|---|---|
| Relevant information | may include Australian Meat and Livestock Corporation reports, bank reports, industry publications, and other industry organisations' reviews. |
| Industry knowledge | may be obtained from information found in press publications, industry journals and reports, radio reports, internal publications, government statistics and reports, internal statistical data, and network contacts. |
| Networks | may include other agents, branches within an organisation, staff meetings, industry associations, trade contacts, and producer contacts. |
| Interested parties | may include other personnel, clients, and potential clients |
| Market variations | may be seasonal or economic. |
| Drafting | means the classifying of livestock according to weight, grade, sex, or type. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to franchising and licensing agreements, industry codes of conduct, property stock and business agent, and common law duty of care. |
| EVIDENCE GUIDE | |
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • an understanding of current trends and the application of such understanding in a working environment |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • access to a computerised or manual environment • access to current publications relevant to the industry, including industry trends, market influences and competitors' activities |

Underpinning knowledge

- Stock values, breeds, weights, grades, yields, classes, ages
- Animal husbandry
- Pastures
- Chemicals
- Law of contracts
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Assessment of stock descriptions
- Drafting
- Presentation of livestock
- Public relations
- Financial analysis
- Interpersonal
- Business written and verbal communications
- Research to enable application of market knowledge to service business opportunities
- Negotiation of alternatives
- Problem-solving
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA19A**Unit Descriptor****Respond to enquiry**

This unit has application where office-based telephone and personal contacts are received relating to the purchase and sale of rural property, provision of livestock services and the giving of expressions of interest in plant, livestock and crop values. It applies to enquiries from both existing and potential clients.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Identify nature and type of enquiry | <ul style="list-style-type: none"> 1.1 Client requirements and degree of urgency are established promptly 1.2 Impact of relevant legislation or company policy for dealing with enquiry and ability to respond are identified 1.3 Enquiries requiring additional research are allocated a priority and arrangements made for follow-up |
| 2. Research information relevant to enquiry | <ul style="list-style-type: none"> 2.1 Information relevant to client needs is identified from company and industry sources 2.2 Information is collated to enable discussions to proceed 2.3 Accuracy and type of information available from client is assessed to determine if on-site inspection is required 2.4 Relevant information is given on market conditions to enable client to make a decision |
| 3. Organise visitation program | <ul style="list-style-type: none"> 3.1 Contact is made with client and any potential vendor and time of visit agreed 3.2 Program of visits is set up to effectively use travelling time 3.3 Copy of schedule of visits is left at office to permit communication during absence 3.4 Client details are recorded to enable follow-up where transaction does not proceed |
| 4. Conduct visit | <ul style="list-style-type: none"> 4.1 Client is visited in a punctual manner, with any delays being promptly communicated to client 4.2 Client's requirements are confirmed at the time of arrival to prevent misunderstandings occurring 4.3 A response is given to client's enquiry, based on additional information provided by client and previous research 4.4 Dress and personal presentation are appropriate for the client group |
| 5. Take instructions | <ul style="list-style-type: none"> 5.1 Instructions are sought from client to enable transaction to proceed 5.2 An action plan is prepared and reviewed with client to reach agreement 5.3 Advice and instructions are given to client to facilitate completion of the transaction 5.4 Files and records are updated to ensure communication within the office is effective |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|---|
| Property | may include rural, livestock, livestock for agistment, plant, and crops. |
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Client | includes existing and potential clients. |
| Enquiries | may be related to purchase and sale of rural property, provision of livestock services, the giving of expressions of interest in plant, livestock and crop values, and agistment of livestock. |
| Visits | may be prearranged or unsolicited. |
| Information | may be found in press publications, industry journals and reports, radio reports, internal publications, government statistics and reports, and internal statistical data. |
| Relevant information | may include Australian Meat and Livestock Corporation reports, bank reports, industry publications, and other industry organisations' reviews. |
| Schedule of visits | may include details of contacts, time and contact numbers on a whiteboard, day-book, and diary. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to trade practices, industry codes of conduct, local government acts, property stock and business agent, landlord and tenancy, strata titles, conveyancing, crown lands, national parks and wildlife, and common law duty of care. |

EVIDENCE GUIDE

Context of assessment

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of the handling of several responses to enquiries in a working environment

Resources required for assessment include:

- access to industry assessors
- availability of properties for physical inspection

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation of alternatives
- Problem-solving
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Accuracy
- Presentation
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities
- Driving
- Scheduling

PRDSSA20A**Unit Descriptor****List properties for sale**

This unit applies where properties are actively sought for listing. It does not address the actual marketing of the property.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Source property listings | <ul style="list-style-type: none"> 1.1 Target groups are identified from an assessment of the business plan and marketing strategy 1.2 A strategy is developed and implemented to access target groups 1.3 Target groups are canvassed in a thorough and systematic manner 1.4 Enquiries are recorded and followed up in a timely manner 1.5 Accuracy and type of information available from potential vendor is assessed to determine timeframe for on-site inspection 1.6 Inspection program is established and agreed with potential vendor 1.7 Potential vendor's requirements are confirmed at time of arrival to prevent misunderstandings occurring 1.8 Image of agency is promoted to generate enquiries |
| 2. Research and evaluate market conditions | <ul style="list-style-type: none"> 2.1 Existing records are reviewed and an inspection program developed to maximise listing opportunities 2.2 Inspections are conducted in a thorough and systematic manner to enable qualifying of potential vendor 2.3 Information gathered is collated and distributed to relevant parties to permit actioning to occur |
| 3. Deliver property marketing listing presentations | <ul style="list-style-type: none"> 3.1 Potential vendors are advised on market influences likely to affect property sales through the provision of reliable information on market trends 3.2 Available options are discussed with potential vendor before agreement is reached on method of sale 3.3 Agreement is confirmed in writing to avoid any misunderstanding 3.4 Agreed instructions are recorded to meet legislative and agency record-keeping requirements 3.5 A property marketing plan is presented and agreed to with vendor 3.6 Dress and personal presentation are appropriate for the client group |
| 4. Record listings | <ul style="list-style-type: none"> 4.1 All relevant parties are advised of the listing in a timely manner 4.2 Listing documentation is completed in accordance with the requirements of the agency, industry and statutory bodies 4.3 Regular follow-up is conducted to enable effective communication with the vendor |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|---|--|
| Target groups | may include existing client base, competitors' clients, and community and business network of contacts. |
| Business plans | may be formal or informal. |
| Canvassing | may include direct contact, advertising, referrals, networking, and market value assessment. |
| Research | may include study of maps, comparable sales, other properties for sale, owner details, title details, water allocation, purpose of use, layout, pastures, soil types, council rates, and examination of client base and potential purchasers. |
| Relevant parties | may include internal personnel, other agents, and existing clients. |
| Available options | may include sale by private treaty, sale by auction, or sale by tender. |
| Confirmation of agreement in writing | may include issuance of a market value assessment. |
| Market value assessment | may include vendor and location details, type of sale, title details, layout and fencing, services available, description of geophysical aspects, use of land, improvements, price/terms of sale, type of agency, advertising responsibility, internal staff handling matter, carrying capacity, pastures, and cropping. |
| Services | may include schools and school buses, power, phone, water, mail, sale yards, grain silos, transport, shopping facilities, airstrip, medical, and hospital. |
| Relevant legislation | may include federal, State and local government. |

Standards and codes of practice

may include those relating to environment, consumer protection, water acts, trade practices, industry codes of conduct, auctioneering acts, local government acts, property stock and business agent, landlord and tenancy, strata titles, conveyancing, crown lands, native title, national parks and wildlife, and common law duty of care.

EVIDENCE GUIDE**Context of assessment**

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of successful processing of at least two listings of differing natures
- evidence that relevant legislation had been identified and complied with

Resources required for assessment include:

- access to industry assessors
- availability of properties for physical inspection
- access to legislation relating to property dealings

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Conveyancing
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research in relation to properties for sale
- Negotiation of alternatives in relation to properties for sale
- Problem-solving in relation to properties for sale
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities
- Presentation in relation to properties for sale

PRDSSA21A**Unit Descriptor****Market property for sale**

This unit has application where a property has been listed and is to be presented for sale.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|------------------------------|---|
| 1. Develop strategy for sale | 1.1 Listing presentation is reviewed to isolate strategic aspects 1.2 Agency staff are briefed on listing to ensure informed service is provided to potential purchasers 1.3 Plan for sale is developed, based on strategic aspects and staff input 1.4 Plan is documented and submitted to vendor to enable commitment to be obtained and implementation of plan to be achieved |
| 2. Implement sale plan | 2.1 Property promotion and advertising are implemented, consistent with the agency's marketing plan 2.2 Advertising schedule and advertisement copy are prepared in accordance with agreed budget and marketing plan 2.3 Advertising schedule, advertisement copy and promotional material are reviewed for quality, cost effectiveness and impact 2.4 The placement of advertising and the development of promotional material are coordinated to ensure maximum impact |
| 3. Monitor plan | 3.1 Plan is reviewed on a systematic and regular basis to establish effectiveness of strategy 3.2 Variations from expected outcomes are identified to enable their impact to be assessed 3.3 Corrective action is taken to rectify identified problems to ensure thrust of program is achieved |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|---|
| Properties | may include grazing, cropping, dairy, irrigation, horticulture, viticulture, aquaculture, hobby farms, and forestry. |
| Strategic matters | may include timing, availability of vendor finance, description of property, and presentation of property. |
| Types of sale | may include private treaty, auction, and tender. |
| Plan documentation | may include budget and advertising schedules. |
| Promotion | may include advertising in all forms of media, brochures, word of mouth, direct mailing to client base and mailing list contacts, telemarketing, Internet, networking with contacts, window displays, and interactive displays. |
| Networking | may include internal, competitors, rural marketing agency, local service clubs, professional advisers, and the Internet. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to environment, consumer protection, water acts, trade practices, industry codes of conduct, auctioneering acts, local government acts, property stock and business agent, landlord and tenancy, strata titles, conveyancing, crown lands, native title, national parks and wildlife, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • successful preparation of at least two marketing programs, including advertising |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • availability of properties for physical inspection • facilities for preparation of marketing programs, preferably in a work environment |

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research in relation to marketing properties for sale
- Negotiation of alternatives
- Problem-solving in relation to marketing properties for sale
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy in relation to marketing properties for sale
- Presentation in relation to marketing properties for sale
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA22A**Unit Descriptor****Negotiate sale by private treaty**

This unit has application where a sale is to be arranged by private treaty, rather than by tender or auction.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Qualify purchaser enquiries | <ul style="list-style-type: none"> 1.1 Enquiries from potential purchasers are screened to ascertain purchaser preferences 1.2 Factors likely to influence the purchase of property are identified and used to confirm purchaser's intentions 1.3 Networks are used to assist in establishing the bona fides of purchasers |
| 2. Apply effective sale techniques | <ul style="list-style-type: none"> 2.1 Factors affecting sale outcome are identified and addressed in formulating a sales strategy 2.2 Key decision makers are identified to ensure that their needs and concerns are met in the inspection of properties 2.3 Appointments are made to enable purchasers to be presented with properties in accordance with agency policy 2.4 Purchasers' needs and motivations are recognised in presenting the salient features of selected properties 2.5 Purchasers' questions are addressed to facilitate a decision to purchase to be made 2.6 Regular contact with purchasers is maintained to ensure current progress of negotiations is known 2.7 Vendor is reliably and consistently informed of sale progress to maintain vendor confidence in agency marketing activities 2.8 Vendor's staff is informed in accordance with vendor's instructions, to facilitate any contact with purchaser 2.9 Qualified prospects are recorded to enable future marketing activities to be optimised 2.10 Dress and personal presentation are appropriate for the client group |
| 3. Submit offers and facilitate agreement between vendor and purchaser | <ul style="list-style-type: none"> 3.1 Offers are obtained and submitted together with relevant supporting advice on market conditions to facilitate an informed decision to be taken by the vendor 3.2 Regular feedback is given to potential purchaser to enable confidence to be built up between all parties 3.3 Vendor's stated position is presented to purchasers in a manner which encourages the parties to reach a decision 3.4 Agreed price and conditions of sale are documented in accordance with agency and statutory requirements to finalise sale 3.5 Deposit is taken and processed in accordance with sales advice |

4. Prepare sale advice
- 4.1 Sales advice is prepared in an accurate and timely manner
 - 4.2 Completed sales advice is delivered in a timely manner to interested parties in accordance with legal and agency operating requirements
 - 4.3 Copies of completed sales advice are filed in office in accordance with agency operating requirements to facilitate follow-up action
5. Ensure client satisfaction
- 5.1 Client satisfaction is evaluated to facilitate creation of an ongoing business relationship
 - 5.2 Business records and databases are updated to facilitate networking and informed marketing strategy planning

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 1 |

RANGE STATEMENT

- Purchaser's intentions** may be influenced by timing of purchase and availability of cash.
- Key decision makers** may include partners, family, financiers, executors, trustees, and professional advisers.
- Sales progress** may include giving feedback to vendor.
- Offers** may be verbal or in writing.
- Vendor's stated position** may include age, health, or financial reasons for selling.
- Reaching agreement** may include negotiation, mediation, compromise and communication.
- Sales advice** may include selling agent(s) names, names and addresses of vendor and purchaser, solicitors, price, deposit requirements, inclusions, special conditions, tax file numbers, stakeholders, and date of settlement.

| | |
|--|--|
| Deposits | may be paid directly to agent or solicitors. |
| Special conditions | may include insurance, natural increases, timber, crops, water licences, permissive occupancy, possession prior to completion, or depasturing. |
| Interested parties | may include solicitors for vendor and purchaser. |
| Follow-up | means regular contact with parties to determine current progress. |
| Follow-up action | may include pending settlements, exchange of contracts, completed sales, and future canvassing. |
| Purchaser's preferences | may include price range, timing of purchase, availability of funds, and type of property. |
| Networks | may include other agents, branches within an organisation, staff meetings, industry associations, and existing client base. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • review of at least two successful sales and discussions with the operator as to their outcomes |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • availability of properties for physical inspection • facility for gathering and collating information on actual performance |

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Trust accounting
- Local land characteristics
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation of alternatives
- Problem-solving in relation to sale by private treaty
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation in relation to sale by private treaty
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA23A**Unit Descriptor****Conduct auction sale**

This unit has application where a property is to be sold by auction. It is closely linked to unit PRDSSA21A Market property for sale, especially in relation to advertising.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------|---|
| 1. Prepare for auction sale | <ul style="list-style-type: none"> 1.1 Agreement to auction is obtained in accordance with statutory and agency requirements 1.2 Solicitor is instructed to prepare contract to reflect sale terms and conditions and to enable sale to proceed 1.3 Solicitor is followed up in a timely manner to ensure contract is delivered prior to auction date 1.4 Auction details are established to enable sale to proceed 1.5 Staff requirements adequate for the activities of the day are determined and arrangements for attendance made 1.6 Property is inspected by auctioneer prior to auction in accordance with statutory and agency requirements 1.7 Vendor is briefed by auctioneer prior to sale to acquaint vendor with probable method of conduct of sale and to establish a reserve price 1.8 Advertising is monitored on a regular basis to establish its effectiveness 1.9 Order of auction is determined to permit preparation of catalogue |
| 2. Conduct auction | <ul style="list-style-type: none"> 2.1 Terms and conditions of sale are prominently displayed and read out prior to the specified time of commencement of sale in accordance with statutory and agency requirements 2.2 Previously identified potential purchasers are located in the audience to facilitate sale 2.3 Property and vendor are identified in relation to the contract prior to offering the property for sale 2.4 Property is presented to public using marketing materials agreed to by vendor to create product image 2.5 Property is submitted for sale to solicit bids 2.6 Property is knocked down to the successful bidder or passed in, in accordance with vendor's instructions 2.7 Interests of vendor are respected at all times in accordance with statutory requirements 2.8 Dress and personal presentation are appropriate for the client group |

3. Complete sale
- 3.1 Contract is signed and executed immediately and deposit taken at the conclusion of sale to evidence vendor's and purchaser's respective obligations
 - 3.2 Negotiations are conducted with highest bidder where property is passed in, in an effort to effect a sale
 - 3.3 Successful outcome of sale is advised to solicitors by sending exchanged, executed contracts in a timely manner
 - 3.4 Deposit is processed promptly in accordance with contract and statutory requirements
 - 3.5 Special contract conditions are followed up to facilitate settlement within contract parameters

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

- Staff** may include auctioneer and clerks, including a recorder.
- Effectiveness** may be measured by enquiry rate and inspections arranged.
- Auction terms and conditions** may include right to bid, auctioneer is sole arbitrator, refusal of bids not in interest of vendor, subject to reserve price, status of bidder as principal or agent, or signing of contract.
- Auction details** may include date, time and venue.
- Method of conduct of sale** may vary according to extent of competition and audience.
- Marketing materials** may include slides, audiovisuals and brochures.
- Negotiations where property is passed in** may be conducted with the highest bidder or other parties.
- Relevant legislation** may include federal, State and local government.

Standards and codes of practice

may include those relating to industry codes of conduct, property stock and business agent, conveyancing, common law duty of care.

EVIDENCE GUIDE**Context of assessment**

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of at least two auctions offering different types of properties
- observation of the handling of difficult situations and their subsequent resolution

Resources required for assessment include:

- access to industry assessors
- availability of properties for physical inspection
- auction facilities to provide exposure to real life situations

Underpinning knowledge

- Duties, liabilities and authority of an auctioneer
- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research in relation to conducting auction sale
- Negotiation of alternatives to auction sale
- Problem-solving in relation to conducting auction sale
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation in relation to conducting auction sale
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities
- Selecting method of conduct of sale

PRDSSA24A**Unit Descriptor****Conduct chattel auction/clearing sale**

This unit applies to auctions of chattels and clearing sales. It is closely linked to unit PRDSSA21A Market property for sale, especially in relation to advertising.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Prepare for a chattel auction/clearing sale | <ul style="list-style-type: none"> 1.1 Agreement to auction is obtained in accordance with statutory and agency requirements 1.2 Auction details are established to enable the sale to proceed 1.3 Staff requirements adequate for the activities of the day are determined and arrangements for attendance made 1.4 Ownership of property to be sold is established to enable clear title to be passed to purchasers 1.5 An inventory of reserve and non-reserve items is prepared which includes pricing requirements 1.6 Auction/clearing sale marketing and promotional aids are set in place in accordance with agency marketing strategy and legal requirements 1.7 Advertising is monitored on a regular basis to establish its effectiveness 1.8 Goods control and security systems are implemented 1.9 Property is inspected by auctioneer prior to sale in accordance with statutory and agency requirements 1.10 Vendor is briefed by auctioneer prior to sale to acquaint vendor with probable method of conduct of sale and to establish reserve prices 1.11 Order of sale is determined to permit preparation of catalogue |
| 2. Conduct a chattel auction/clearing sale | <ul style="list-style-type: none"> 2.1 Terms and conditions of sale are prominently displayed and read out prior to the specified time of commencement of sale in accordance with statutory and agency requirements 2.2 Bidder security systems are effected to eliminate theft and non-payment 2.3 Previously identified potential purchasers are located in the audience to facilitate sale 2.4 Property is presented to public using marketing materials agreed to by vendor to create product image 2.5 Property is submitted for sale to solicit bids 2.6 Property is knocked down to the successful bidder or passed in accordance with vendor's instructions 2.7 Interests of vendor are respected at all times in accordance with statutory requirements 2.8 Completed sales are documented in accordance with vendor, buyer, agency and statutory requirements 2.9 Identified bidders are followed up to clarify interest in future auctions/sales and to maintain agency contact 2.10 Dress and personal presentation are appropriate for the client group |

3. Complete sale
- 3.1 Negotiations are conducted with the highest bidder where property is passed in an effort to effect a sale
 - 3.2 Completed sales are documented in accordance with vendor, buyer, agency and statutory requirements
 - 3.3 Purchase consideration is collected in accordance with sale terms and conditions

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Staff | may include auctioneer and clerks, including a recorder. |
| Effectiveness | may be measured by enquiry rate and inspections arranged. |
| Chattels | may include machinery, furniture and other items of movable equipment. |
| Auction terms and conditions | may include vendor's right to bid, auctioneer as sole arbitrator, refusal of bids not in interest of vendor, subject to reserve price, status of bidder as principal or agent, all lots open for inspection prior to commencement of sale, and application of purchasers' premiums where applicable. |
| Auction details | may include date, time and venue. |
| Marketing materials | may include slides, audiovisuals and brochures. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

Context of assessment

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of a minimum of two auctions, including identification of the resolution of difficult situations

Resources required for assessment include:

- access to industry assessors
- availability of properties for physical inspection
- auction facilities to provide exposure to real life situations

Underpinning knowledge

- Duties, liabilities and authority of an auctioneer
- Local market conditions and overall trends in the industry
- Law of contracts
- Geophysical and topographical characteristics
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Antiques
- Art
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research in relation to conducting chattel auction/clearing sale
- Negotiation of alternatives
- Problem-solving in relation to conducting chattel auction/clearing sale
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation in relation to conducting chattel auction/clearing sale
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA25A**Unit Descriptor****Conduct a sale by tender**

This unit covers sales by tender. It is closely linked to unit PRDSSA21A Market property for sale.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--------------------------------------|---|
| 1. Prepare for sale by tender | <ul style="list-style-type: none"> 1.1 Agreement to sell by tender is obtained from vendor in accordance with statutory and agency requirements 1.2 Solicitor is instructed to prepare tender document at the same time as the contract is prepared 1.3 Solicitor is followed up in a timely manner to ensure prompt delivery of tender document 1.4 Tender details are established to enable sale to proceed 1.5 Property promotion and advertising are implemented consistent with the agency's marketing plan 1.6 Advertising schedule and advertisement copy are prepared in accordance with agreed budget and marketing plan 1.7 Advertising schedule, advertisement copy and promotional material are reviewed for quality, cost effectiveness and impact 1.8 The placement of advertising and the development of promotional material are coordinated to ensure maximum impact |
| 2. Receive tenders and complete sale | <ul style="list-style-type: none"> 2.1 Tenders are placed in a locked container to maintain confidentiality until closing date 2.2 Progress on receipt of tenders is advised to the vendor on a regular basis 2.3 Tenders are made available to vendor after closing date so that a decision can be taken on success or otherwise of the process 2.4 Successful tenderer is promptly advised so that contract can be signed 2.5 Negotiations are conducted with tenderers in accordance with instructions from the vendor 2.6 Contract is executed and deposit taken at the conclusion of the process to evidence vendor's and purchaser's respective obligations 2.7 Successful outcome of process is advised to solicitors by sending exchanged contacts in a timely manner 2.8 Deposit is processed promptly in accordance with contract requirements 2.9 Special contract conditions are followed up to facilitate settlement within contract parameters |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Tender terms and conditions | may include closing date, venue for depositing tender document, and withdrawal of tenders. |
| Negotiations where tender is unacceptable | may be conducted with all or selected tenderer. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • availability of properties for physical inspection • auction facilities to provide exposure to real life situations |

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Antiques
- Art
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research in relation to conducting a sale by tender
- Negotiation of alternatives to sale by tender
- Problem-solving in relation to conducting a sale by tender
- Interpersonal
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation in relation to conducting a sale by tender
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA26A**Administer process to completion or abandonment of sale****Unit Descriptor**

This unit covers administrative procedures and issues for consideration in an uncompleted sale. It includes possible deterioration of stock, chattels and property if the sale fails to complete. This unit is closely linked to units PRDSSA22A Negotiate sale by private treaty; PRDSSA23A Conduct auction sale; PRDSSA24A Conduct chattel auction/clearing sale; and PRDSSA25A Conduct a sale by tender.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------------|---|
| 1. Facilitate property settlement | <ul style="list-style-type: none"> 1.1 Requirements to enable settlement to occur are identified and checked with parties 1.2 Settlement requirements are identified within contract, agency and statutory requirements 1.3 Contact is maintained with legal and other parties representing the vendor and purchaser to ensure settlement is effected within established timeframe 1.4 Problems are identified to enable resolution to be achieved 1.5 Inclusions specified in the contract are verified to facilitate settlement 1.6 Contingency plans are prepared to cover the situation where completion of contract cannot be effected |
| 2. Manage agency disbursements | <ul style="list-style-type: none"> 2.1 Respective obligations of parties to effect disbursements are established to facilitate final monetary settlement 2.2 Authorisations are obtained within contractual, agency and statutory requirements to enable disbursements to be made 2.3 Settlement financial transactions are prepared and checked to ensure contractual requirements are observed 2.4 Necessary settlement statement and cheques are prepared and delivered to reflect completion of contractual obligations 2.5 Settlement is attended in accordance with contractual, vendor and agency requirements 2.6 Financial records are updated to reflect the transaction 2.7 Documents are filed in a timely manner in accordance with agency and statutory requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Requirements | may include confirmation and interpretation of contract inclusions, the pasturing of livestock, clearing of timber, and verification of equipment specifications. |
| Inclusions | may be irrigation equipment, trailers, pipes, machinery, fencing materials, and electric fencing components. |
| Disbursements | may include commission, legal fees, interest, government charges, balance of deposit, advertising, and cleaning and service charges. |
| Authorisations | include orders on agent. |
| Resolution | may be achieved through negotiation, mediation or compromise. |
| Cheques prepared | may include withdrawal of deposit funds, or interest payment to vendor and purchaser. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to consumer protection, trade practices, industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

Context of assessment

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Assessment of this unit should be in conjunction with units:

- PRDSSA22A Negotiate sale by private treaty
- PRDSSA23A Conduct auction sale
- PRDSSA24A Conduct chattel auction/clearing sale
- PRDSSA25A Conduct a sale by tender.

Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.

Resources required for assessment include:

- availability of sales files for processing

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation of alternatives to completion or abandonment of sale
- Problem-solving in relation to completion or abandonment of sale
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA27A**Unit Descriptor****Lease rural property**

This unit deals with the processes involved in leasing rural property. Competency in the following units is a prerequisite for this unit: PRDSSA19A Respond to enquiry; PRDSSA20A List properties for sale; and PRDSSA21A Market property for sale.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|------------------------------|---|
| 1. Respond to enquiry | <ul style="list-style-type: none"> 1.1 Client requirements and degree of urgency are established promptly 1.2 Information relevant to client needs is identified from company and industry sources 1.3 Contact is made with client to arrange a visit so that a property inspection can occur 1.4 Client is visited in a punctual manner, with any delays being promptly communicated to client 1.5 Client's requirements are confirmed at the time of arrival to prevent misunderstandings occurring 1.6 Instructions are sought from client to enable transaction to proceed 1.7 An action plan is prepared and reviewed with client to reach agreement 1.8 Files and records are updated to ensure communication within the office is effective |
| 2. List property for lease | <ul style="list-style-type: none"> 2.1 Type and complexity of documentation is determined to allow necessary instructions to be given to legal advisors 2.2 Target groups are identified from an assessment of the marketing strategy 2.3 A strategy is developed and implemented to access target groups 2.4 Enquiries are recorded and followed up in a timely manner |
| 3. Market property for lease | <ul style="list-style-type: none"> 3.1 Plan for lease is developed based on strategic matters and staff input 3.2 Plan is documented and submitted to vendor to enable commitment to be obtained and implementation of plan to be achieved 3.3 Property promotion and advertising are implemented consistent with the agency's marketing plan 3.4 Advertising schedule and advertisement copy are prepared in accordance with agreed budget and marketing plan 3.5 Advertising schedule, advertisement copy and promotional material are reviewed for quality, cost effectiveness and impact 3.6 The placement of advertising and the development of promotional material are coordinated to ensure maximum impact 3.7 Plan is reviewed on a systematic and regular basis to establish effectiveness of strategy |

- | | |
|--|--|
| 4. Obtain and review lease applications | 4.1 Leasing applications are reviewed to ensure completeness and accuracy of information provided 4.2 Applicant's references and background are checked and results recorded in accordance with agency procedures 4.3 Applications are referred to client for instruction 4.4 The selected applicant is notified and details recorded in agency's systems |
| 5. Facilitate preparation of documentation | 5.1 Documentation is obtained to enable its execution by relevant parties 5.2 Statutory, agency and client requirements for documentation are met 5.3 Required government fees and duty are paid as stipulated 5.4 Documentation is served to relevant parties in the required timeframes to permit its execution |
| 6. Record leasing arrangements | 6.1 Records of all property management contracts and actions required are entered on the appropriate database 6.2 Moneys received and disbursements made in accordance with contract and statutory requirements are accurately reflected in the trust accounts |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

- Client** includes existing and potential clients.
- Information** may be found in press publications, industry journals and reports, radio reports, internal publications, government statistics and reports, and internal statistical data.
- Relevant information** may include Australian Meat and Livestock Corporation reports, bank reports, industry publications, and other industry organisations' reviews.

| | |
|--|---|
| Inspection | may be required to establish lease rental payable, extent of use of farm structures and plant, cropping regime, extent of areas for use of farming and/or grazing, stocking limits, type of livestock, access to irrigation, exclusion areas, pasture improvement and rotation, use of fertilisers and other rural chemicals, entitlement to standing crops and hay, responsibility for legal costs of parties, and requirements of statutory bodies. |
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Target groups | may include existing client base, competitors' clients, and neighbours of client. |
| Plan for lease | may include selection through the tender process or private negotiation. |
| Promotion | may include advertising in all forms of media, brochures, word of mouth, direct mailing to client base and mailing list contacts, telemarketing, Internet, networking with contacts, window displays, and interactive displays. |
| Documentation | may be pre-printed or specifically prepared by legal advisors. |
| Statutory requirements | include procedures and forms prescribed by statute, and may affect work organisation and performance. Variations in statutory requirements occur between States. |
| Relevant parties | include client, potential lessee, legal and financial representatives of client and potential lessee. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to consumer protection, trade practices, industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

| | |
|------------------------------|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • successful preparation of a minimum of two rural leases, including advertising |
|------------------------------|--|

Resources required for assessment include:

- access to industry assessors
- availability of properties for physical inspection
- facilities for preparation of marketing programs, preferably in a work environment

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical/climatic and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Local service providers for fencing, shearing, cartage, agricultural consultants
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Written and verbal business communications
- Research
- Negotiation of alternatives to lease of a rural property
- Problem-solving in relation to lease of a rural property
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Accuracy
- Personal presentation
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA28A**Unit Descriptor****Unit Sector****Manage properties for clients**

This unit covers property management in rural environments.

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Appraise client of concept | <ul style="list-style-type: none"> 1.1 Client's expectations as to period of commitment are established to enable a management program to be formulated 1.2 Extent of services to be offered and risks to be covered are framed after consultation with client 1.3 Respective obligations of client and agency are determined and agreed with client 1.4 An educational program to assist client in understanding implications of concept is designed |
| 2. Plan provision of services | <ul style="list-style-type: none"> 2.1 Agreement with client is documented into a heads of agreement to minimise misunderstanding 2.2 Parties to be involved with project are identified to enable briefing to occur 2.3 Budgeting and reporting requirements are discussed with client to establish relative preparation and reporting responsibilities |
| 3. Deliver property management proposal | <ul style="list-style-type: none"> 3.1 Potential clients are advised on market influences likely to affect property operations through the provision of reliable information on market trends 3.2 Available options are discussed with potential clients before agreement is reached on management program 3.3 Agreed instructions are recorded to meet legislative and agency record-keeping requirements |
| 4. Record management contracts | <ul style="list-style-type: none"> 4.1 All relevant parties are advised of the contract in a timely manner 4.2 Documentation is completed in accordance with the requirements of the agency, industry and statutory bodies |
| 5. Implement management plan | <ul style="list-style-type: none"> 5.1 Internal and external systems are established in accordance with contract and agency requirements 5.2 Necessary internal staff and external contractors are recruited to meet contract requirements 5.3 Trust accounts are established and operated within statutory and systems requirements of the agency 5.4 Required reports are prepared and audits are performed on trust accounts 5.5 Risk management, including insurance, is undertaken within the terms of agreement with client 5.6 Property security measures are established within the terms of the property management agreement 5.7 Regular and planned inspections of managed property are undertaken to ensure its security 5.8 Condition and usage patterns of managed property is monitored to ensure no abnormal deterioration in property condition occurs 5.9 Property maintenance schedule is implemented and monitored |

PRDSSA28A Manage properties for clients

- | | |
|---------------------------------|--|
| 6. Monitor and report to client | 6.1 Performance of property is monitored on a regular basis to identify any adverse trends 6.2 Corrective action is taken within the constraints of the property management agreement 6.3 Reports are prepared for client in accordance with property management agreement |
| 7. Plan for tenancy renewals | 7.1 The tenancy lease and renewal pattern for the agency is assessed and strategies developed to maximise agency income 7.2 Lease expiries are scheduled to ensure tenancy renewals are obtained prior to expiry date |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

- Property** may include rural, and livestock for agistment.
- Parties** may include internal staff, client, and professional advisers.
- Services offered** may be:
- complete management of rural properties, including stocking, animal husbandry, purchase and sale of livestock within budget constraints
 - maintenance of structures, including fences
 - maintenance of rental properties, renting of rural properties, arranging agistment of livestock
 - employment of staff, use of agency internal staff, external subcontractors
- Heads of agreement** may include parties to agreement, extent of services offered, fees payable, respective obligations, period of agreement, termination clause, and specification of environmental matters.

| | |
|--|--|
| Market influences | may include seasonal factors, overseas trends, availability of comparable properties, supply and demand issues, government policies, bank policies, and taxation implications. |
| External contractors | may include stockpersons, labourers, farm hands, wool and grain contractors, and maintenance contractors. |
| Property security measures | may include use of security agents, and/or employment of a manager. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to environment, consumer protection, water acts, industry codes of conduct, local government acts, property stock and business agent, national parks and wildlife, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none">• review of the actual work performed under conditions that closely resemble normal industry operating conditions• observation of a minimum of two property managements• observation of effectiveness of communication (both written and oral) with principals. |
| Resources required for assessment include: | <ul style="list-style-type: none">• access to industry assessors• availability of properties for physical inspection• case studies on property management |

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)
- For irrigated properties:
• Water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation of alternatives
- Problem-solving in relation to managing properties for clients
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA29A**Unit Descriptor****Advise client on sale and purchase alternatives**

This unit has application where a client requires service in both selling and buying livestock where one of a number of systems may be used. There are close links with those units that deal with the various methods of sale including auction, private treaty, tender and electronic.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--------------------------------|---|
| 1. Determine client's needs | 1.1 Client requirements and degree of urgency are established promptly |
| | 1.2 Motivation of client to sell is identified to assist in preparation of a sales program |
| 2. Give background information | 2.1 Relevant information is given on market conditions and selling and buying options to enable the client to make a decision |
| | 2.2 Projected financial returns or outlays are calculated to ensure that the client is informed before a decision is taken |
| 3. Recommend course of action | 3.1 Based on client's decision, a plan of action is prepared and discussed with the client so that agreement can be reached |
| | 3.2 Details of the plan of action are given to the client to minimise possibility of misunderstanding |
| | 3.3 Plan details are advised to internal staff to enable resources and programs to be established |
| 4. Take instructions | 4.1 Instructions are sought from the client to enable the transaction to proceed |
| | 4.2 Action plan is reviewed and implemented according to its requirements |
| | 4.3 Advice and instructions are given to the client to facilitate completion of the transaction |
| | 4.4 Documentation is completed in a timely manner to reflect agreement reached |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|---|
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Financial returns | may be influenced by market prices, freight, drafting, yard dues, government fees and levies, timing of transaction, and type of sale process. |
| Drafting | means the classifying of livestock according to weight, grade, sex, or type. |
| Selling and buying options | may include private treaty, electronic, direct, auction, and forward contracts. |
| Plan of action advice | may be written or verbal. |
| Documentation | may include statement of relative legal position of each party, and indemnities. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to environment, consumer protection, water acts, trade practices, industry codes of conduct, auctioneering acts, local government acts, property stock and business agent, landlord and tenancy, strata titles, conveyancing, crown lands, native title, national parks and wildlife, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors |

Underpinning knowledge

- Livestock values, breeds, weights, grades, yields, classes, ages
- For sheep: cutting (heavy or otherwise); micron type; high or low yield; frame; presentation of vegetable and other matter in fleece; footrot; and skins values for lambs
- Animal husbandry/health
- Pastures
- Chemicals
- Law of contracts
- Market trends and conditions
- Sources of supply
- Differing methods of buying and selling livestock

Underpinning skills

- Assessment of stock descriptions
- Drafting
- Presentation of livestock
- Public relations
- Financial analysis
- Interpersonal
- Business written and verbal communications
- Research
- Negotiation of alternatives to sale or purchase
- Problem-solving in relation to sale or purchase
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA30A**Select stock for sale****Unit Descriptor**

This unit applies where a commitment to sell has been received from a client and the auction system will be used.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---------------------------------------|--|
| 1. Have stock provided for inspection | 1.1 Client is notified of livestock inspection requirements to facilitate selection process 1.2 Visit schedule is prepared to ensure punctuality is observed 1.3 Arrival timing variations are communicated to client promptly to minimise disruptions 1.4 Sale details are arranged and advised to relevant parties |
| 2. Inspect, assess and draft stock | 2.1 Client instructions are obtained to assist in accurate drafting 2.2 Initial assessment of stock is advised to client and instructions received to permit final drafting 2.3 Livestock is drafted in accordance with agreed criteria |
| 3. Obtain commitment to sell | 3.1 Owner of livestock is identified to eliminate any misunderstanding 3.2 The existence of any encumbrances is established to facilitate clear title to be given 3.3 Agreement to sell is obtained from client so that sale process can proceed 3.4 Necessary documentation is prepared and signed to evidence commitment |
| 4. Arrange transport | 4.1 Transport requirements are agreed with client to permit arrangements to be made 4.2 Necessary arrangements are made in accordance with the agreed delivery schedule |
| 5. Draw order of sale and penning | 5.1 Information on order of sale is sought after order has been determined by the authorised person 5.2 Stock entries are compiled to enable penning to be allotted 5.3 Supervisor is advised of livestock numbers in accordance with sale yard rules 5.4 Client is advised of livestock numbers entered for sale in accordance with any previous agreement 5.5 Client's intention to proceed with sale is confirmed 5.6 Penning details are advised to staff to permit penning and securing of livestock |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Livestock inspection requirements | may include time and date of inspection, and inspection of venue. |
| Assessment of stock | may include fat score, weight, dentition, and whether for private sale, auction or Computer Aided Livestock Auction (CALM). |
| Necessary documentation | may include sale contracts, national vendor declarations, pregnancy tests data, crossing papers, footrot free declarations, delivery dockets for feedlots and shipping, veterinary certificates, and stud registration papers. |
| Sale details | may include date, time and venue. |
| Transport requirements | may include responsibility to arrange, type of vehicle, time and venue of pick-up, loading requirements, delivery location and time, and insurance. |
| Draw and penning details | include weigh time, sale time, and penning arrangements. |
| Authorised person | may include duty agent, saleyard superintendent, or association secretary. |
| Provision of livestock for inspection | includes yarding, paddock inspection, assessment, drafting, venue advice, and time of inspection. |
| Client instructions | may include reserve prices, ownership details, proceeds distribution, drafting for presentation, advertising, transportation requirements, tail tagging, and livestock descriptions. |

| | |
|--|--|
| Distribution of proceeds | may involve payments to owner(s), including splits between partners, holders of encumbrances, financial institutions and other third parties, as directed in writing. |
| Encumbrances | may include stock mortgages and bills of sale. |
| Instructions to clients | may include national vendor declarations, fasting, withholding periods, tail and ear tags, quality assurance, and transport arrangements. |
| Agreed criteria | may include client's instructions on presentation, or instructions to client. |
| Agreement | may include verbal or written, or contract note. |
| Presentation | includes physical appearance of livestock, timeliness under saleyard rules and by-laws. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to public health, public liability, environmental, trade practices, industry codes of conduct, quality assurance, national vendor declarations, diseases, property stock and business agent, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • observation during a minimum of two selection processes • accuracy of selection to meet client's instructions |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • real life situation for stock selection |

Underpinning knowledge

- Stock values, breeds, weights, grades, yields, classes, ages
- Animal husbandry
- Pastures
- Chemicals
- Law of contracts
- Conditions of sale
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)

Underpinning skills

- Assessment of stock descriptions
- Drafting
- Presentation of livestock
- Public relations
- Financial analysis
- Interpersonal
- Business written and verbal communications
- Research in relation to selection of stock
- Negotiation of alternatives in relation to selection of stock
- Problem-solving in relation to selection of stock
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA31A**Unit Descriptor****Prepare stock for sale**

This unit has application to those sales where delivery to saleyards is required as part of the selling process.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---------------------------|--|
| 1. Take delivery at yards | 1.1 Staffing requirements are determined to ensure that adequate resources are available 1.2 Staff are advised of delivery details to facilitate delivery process 1.3 Deliveries are recorded in accordance with yard and organisation requirements 1.4 Receival penning is arranged to ensure that it is available on delivery of livestock 1.5 Pre-sale catalogues are prepared in accordance with sale requirements |
| 2. Draft and pen stock | 2.1 Livestock is branded in accordance with sale requirements 2.2 Livestock is drafted and, where applicable, weighed prior to final penning in accordance with sale requirements 2.3 Livestock is placed in final allocated pens in accordance with sale requirements 2.4 Information on livestock is displayed as required by the code of practice 2.5 Details of livestock are entered into the sales register in accordance with sale requirements |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT**Livestock**

may include cattle, sheep, horses, goats, alpacas, deer, and ostriches.

| | |
|--|--|
| Information on cattle in pens | may include lot number, time of arrival at saleyard, date of arrival if applicable, time of weighing, vendor's name, district of origin, total weight, average weight, number of cattle, category of cattle, and pregnancy status of cows. |
| Information on other livestock | may include lot number, time of arrival at saleyard, date of arrival, time of weighing, vendor's name, district of origin, average weight, number of head, category of livestock, and pregnancy status of females. |
| Weighing | may take place either pre or post sale. |
| Categories of cattle | may include vealer, bullock, cow, and bull. |
| Information of sheep in pens | may include vendor's name and address, number in pen, and description. |
| Pre-sale catalogues | may include names and addresses of vendors, accreditation information, breed and where raised, period of ownership if not bred on a vendor's property, exposure to CFZ, proprietary stock feeds used, history of chemical treatment within 60 days of sale, and organochloride exposure. |
| Recording | occurs in the sales register. |
| Conditions in accordance with yards | include code of practice including curfew and time of arrival. |
| Staff | includes contractors. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to public health, public liability, environmental, trade practices, industry codes of conduct, quality assurance, national vendor declarations, diseases, property stock and business agent, and common law duty of care. |

EVIDENCE GUIDE

| | |
|------------------------------|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • observation of a minimum of two stock sales. |
|------------------------------|--|

Resources required for assessment include:

- access to industry assessors
- real life sale activities

Underpinning knowledge

- Stock values, breeds, weights, grades, yields, classes, ages
- Animal husbandry
- Pastures
- Chemicals
- Law of contracts
- Human resources
- Appropriate legislation

Underpinning skills

- Assessment of stock descriptions
- Drafting
- Presentation of livestock
- Attention to detail
- Public relations
- Financial analysis
- Interpersonal
- Business written and verbal communications
- Research
- Negotiation of alternatives
- Problem-solving in relation to preparation of stock for sale
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA32A**Unit Descriptor****Conduct livestock sale by auction**

This unit applies to the disposal of livestock through the auction process. This unit is closely linked to unit PRDSSA21A Market property for sale, in relation to advertising.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|----------------------------|---|
| 1. Arrange staff | 1.1 Staff requirements are determined |
| | 1.2 Adequate staff are arranged to meet the needs of the activities of the day |
| 2. Conduct auction | 2.1 Terms and conditions of sale are prominently displayed and read out prior to the specified time of commencement of sale in accordance with legal requirements |
| | 2.2 Auction is conducted under the terms and conditions of sale |
| | 2.3 Livestock is offered for sale based on a description advised to the public |
| | 2.4 Bids are received and called in accordance with accepted auctioneering procedures |
| | 2.5 Winning bid is knocked down and the name of the purchaser and sale details are recorded immediately and accurately in the sales book |
| | 2.6 The successful purchaser's name and purchase price are recorded in an accurate and timely manner in the sales register |
| | 2.7 Unsuccessful offerings are recorded as a non-sale in an accurate and timely manner in the sales register |
| | 2.8 Interests of vendor are respected at all times in accordance with statutory requirements |
| 3. Reconcile stock records | 3.1 Recorded transactions are delivered to organisation's office personnel to enable preparation of financial records and post-sales catalogue |
| | 3.2 Purchasers are encouraged to visit the office at the yards at the conclusion of the sale to agree purchase details prior to delivery |
| | 3.3 Post-sales summary is prepared based on recorded sales information and pre-sales catalogue, and provided to purchasers |
| | 3.4 Numbers are balanced to total of inward delivered livestock |
| | 3.5 Sales register is signed by the auctioneer within the prescribed period |
| | 3.6 Pre and post-sales catalogues are held by the agent or a central management body for the retention period to facilitate the answering of enquiries |
| 4. Facilitate delivery | 4.1 Assistance is given in the identification of livestock to permit ease of delivery to purchaser |
| | 4.2 Delivery is arranged for purchases, effected by the agent acting on behalf of clients |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|----------------------------|--|
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Staff requirements | may include licensed auctioneer, bid-takers, booking clerks, office clerks, and drovers. |
| Office | includes saleyard and city location. |
| Description | may include disclosure of bloodlines, district of origin, and breeding/fattening background. |
| Booking sheets | may include cards, multi-sheeted books, or a system of two records maintained by independent persons. |
| Sales details | may include number sold, name of buyer, sex of livestock, description, or weight. |
| Post-sales summary | may include details of pre-sale catalogue relevant to the purchase. |
| Retention period | is two years from date of sale. |
| Prescribed period | is that which is in accordance with auctioning laws. |
| Purchasers | may include supermarket chains, exporters, feedlot operators, or individuals purchasing large or small numbers of stock. |
| Purchase details | may include pen number, number purchased, name of purchaser, price, weight. |
| Pre-sale catalogues | may be prepared by agency staff or a central bureau and may be manual or computerised. |

| | |
|--|--|
| Post-sale summaries | may be prepared by agency staff or a central bureau and may be manual or computerised. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to public health, public liability, environmental, trade practices, industry codes of conduct, quality assurance, national vendor declarations, diseases, property stock and business agent, and common law duty of care. |

EVIDENCE GUIDE

Context of assessment Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of a minimum of two auctions
- observation of the resolution of difficult situations

Resources required for assessment include:

- auction facilities to provide exposure to real life situations

Underpinning knowledge

- Value of livestock
- Potential bidders
- Product knowledge in relation to livestock
- Law/rules of auction
- Dress sense when conducting a livestock sale by auction

Underpinning skills

- Articulation
- Authoritativeness
- Retentive memory
- Observation of detail
- Business written and verbal communications
- Research in relation to conducting a livestock sale by auction
- Negotiation of alternatives to a livestock sale by auction
- Problem-solving in relation to conducting a livestock sale by auction
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

PRDSSA33A**Unit Descriptor****Arrange buyer and inspections**

This unit has application where sales are by private treaty and not through the auctioning system.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---------------------------------------|---|
| 1. Have stock provided for inspection | 1.1 Client is notified of livestock inspection requirements to facilitate selection process 1.2 Schedule of visits is prepared to ensure punctuality is observed 1.3 Arrival timing variations are communicated to client promptly to minimise disruptions |
| 2. Inspect and draft stock | 2.1 Client instructions are obtained to assist in accurate drafting 2.2 Initial assessment of stock is advised to client and instructions received to permit final drafting 2.3 Livestock is drafted in accordance with agreed criteria |
| 3. Obtain commitment to sell | 3.1 Agreement to sell is obtained from client enabling process to proceed 3.2 Necessary documentation is prepared and signed by vendor as evidence of commitment to proceed |
| 4. Advertise sale | 4.1 Inspection is conducted to establish description of livestock to be sold 4.2 Value of livestock is agreed with vendor based on discussions 4.3 Advertising layout is prepared and agreed with vendor |
| 5. Respond to buyer enquiry | 5.1 Enquiries are received and recorded as required by internal policy and procedures 5.2 Bona fides of enquirer are established to streamline the selling process |
| 6. Arrange inspections | 6.1 Vendor is contacted to confirm livestock is still for sale 6.2 A mutually convenient time for inspection is arranged with vendor 6.3 Vendor is advised of inspection requirements to avoid confusion and waste of time 6.4 Inspection arrangements are advised to potential buyer in a timely and clear manner |
| 7. Negotiate and close sale | 7.1 Negotiations are conducted so that agreement on a sale can be reached 7.2 When agreement has been reached the necessary documentation is completed to reflect the sale |
| 8. Arrange delivery | 8.1 Transport requirements are agreed with vendor and purchaser to permit arrangements to be made 8.2 Necessary arrangements are made in accordance with the agreed schedule |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Livestock | may include cattle, sheep, horses, goats, alpacas, deer, and ostriches. |
| Livestock inspection | requirements may include time and date of inspection, and inspection of venue. |
| Necessary documentation | may include sale contracts, national vendor declarations, pregnancy tests data, crossing papers, footrot free declarations, delivery dockets for feedlots and shipping, veterinary certificates, and stud registration papers. |
| Transport requirements | may include responsibility to arrange, type of vehicle, time and venue of pick-up, loading requirements, and delivery location and time. |
| Provision of livestock for inspection | includes yarding, paddock inspection, venue advice, drafting, and time of inspection. |
| Client instructions | may include ownership details, proceeds distribution, drafting for presentation, advertising, transportation requirements, tail tagging, livestock descriptions, and method of selling. |
| Instructions to clients | may include national vendor declarations, withholding periods, tail and ear tags, quality assurance, and transport arrangements. |
| Selling options | may include private treaty, electronic, direct to trade, and forward contracts. |
| Agreed criteria | may include client's instructions on presentation and instructions to client. |
| Agreement | may include verbal or written, or contract note. |

| | |
|---|--|
| Presentation includes | physical appearance of livestock and venue for inspection. |
| Advertising layout | includes descriptions of livestock for sale and price, if applicable. |
| On-site stud and dairy sale requirements | include preparation of a pre-sale catalogue and concise and detailed livestock description. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to industry codes of conduct, property stock and business agent, conveyancing, and common law duty of care. |

EVIDENCE GUIDE

| | |
|---|---|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors |
| Underpinning knowledge | <ul style="list-style-type: none"> • Stock values, breeds, weights, grades, yields, classes, ages • Animal husbandry • Pastures • Chemicals • Law of contracts • Market trends • Sources of supply |
| Underpinning skills | <ul style="list-style-type: none"> • Assessment of stock descriptions • Drafting • Presentation of livestock • Public relations in relation to buyer inspections • Financial analysis • Interpersonal skills • Business written and verbal communications • Research in relation to buyer inspections • Negotiation of alternatives • Problem-solving in relation to buyer inspections • Negotiating in relation to buyer inspections • Establishing the degree of involvement of statutory and community bodies in day-to-day activities |

PRDSSA34A**Provide information on alternative use of assets****Unit Descriptor**

This unit addresses activities involved in providing clients with information to assist them in their investment decisions involving their assets. It does not cover the practice of giving general financial investment advice.

Unit Sector

Stock and station agency

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Establish market for offering guidance on asset utilisation | 1.1 Opportunities for agency consulting services in relation to subject assets are identified and evaluated within agency business strategies and budgets 1.2 The scope of available agency services is explained to potential clients |
| 2. Prepare and explain plans to clients | 2.1 The existing capacity and opportunities affecting the subject assets are compared with client expectations and commercial factors in the market 2.2 The prospects for growth, profitability and return on subject assets are identified and provided to the client 2.3 Alternative asset investment strategies are identified 2.4 Client instructions are obtained and documented for future use 2.5 Project proposal is developed, agreed between the relevant parties and used to inform those involved in the implementation phase |
| 3. Guide implementation of the plan | 3.1 Performance is assessed against agreed performance indicators 3.2 Adjustments to the strategy and activities are made, as required, in the light of market movements and client instructions 3.3 Regular reports are provided to client as determined by agency and client requirements 3.4 Terms of the contract are reviewed at regular intervals and adjustments negotiated to the satisfaction of relevant parties |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|--|
| Client expectations | may include immediate or long-term capital gains, compulsory acquisition, compensation, insurance settlements, and succession planning. |
| Commercial factors | may include availability of finance; interest rates and rates of return on asset utilisation; environmental planning; federal, State and local government planning requirements; and current and projected market trends. |
| Alternative asset investment strategies | may involve rural subdivisions, conversion of titles, and changes in land use and stocking. |
| Relevant parties | may include clients, agency personnel involved in project, professional advisers, and finance providers. |
| Performance indicators | may include industry indicators, actual returns compared to budget, comparable returns in local and similar localities, and satisfaction of client. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to public health, public liability, environmental, trade practices, industry codes of conduct, quality assurance, auctioneering acts, national vendor declarations, notifiable diseases act, property stock and business agent, common law duty of care |

EVIDENCE GUIDE

| | |
|---|---|
| Context of assessment | <p>Assessment will normally be carried out as part of the overall agency management operations.</p> <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include:</p> <ul style="list-style-type: none"> • review of the actual work performed under conditions that closely resemble normal industry operating conditions • acceptance of proposals by clients • successful project outcomes |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • availability of properties for physical inspection • access to information relevant to projects, which may include databases and previous files for critical analysis as case studies |

Underpinning knowledge

- Local market conditions and overall trends in the industry
- Law of contracts
- Land titles
- Geophysical and topographical characteristics
- Carrying capacity
- Economy
- Agriculture, horticulture, viticulture
- Animal husbandry
- Business principles
- Local land characteristics
- Human resources
- Planning requirements
- Financial management
- Dress sense
- For dairies: quotas, breeds, lactation, dairy layout and equipment, conversion factor (dairy set up, herd, access, distance to market)
- For cropping properties: yields, seasons, types of crops, soils, facilities (grain storage, transport), diseases, rotational cropping
- For grazing properties: DSE/carrying capacity, pastures, soil types, breeds
- For irrigated properties: water licence availability, soil types, topography, types of reticulation (flood, drip, direct, row cropping)

Underpinning skills

- Business written and verbal communications
- Research
- Negotiation of alternative asset uses
- Problem-solving
- Interpersonal
- Analytical
- Mediation
- Numerical
- Financial
- Computing
- Accuracy
- Presentation
- Establishing the degree of involvement of statutory and community bodies in day-to-day activities

BSAFIN301B**Maintain daily financial records for accounting purposes****Unit Descriptor**

This unit covers maintaining common financial records such as petty cash, cash journals, bank reconciliations and accounts.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Enter cash transactions into cash journals | <ul style="list-style-type: none"> 1.1 Transactions are entered into cash journals and totalled 1.2 Cash journal entries are checked against individual documents 1.3 Cash journals are cross-checked and proofed 1.4 Cash journal errors are noted and reported to nominated person/section for resolution within designated timelines |
| 2. Prepare bank reconciliations | <ul style="list-style-type: none"> 2.1 Cash receipts and payout summaries are checked for accuracy against bank statements 2.2 Direct debits and credits are entered into cash journals 2.3 Discrepancies are noted and resolved 2.4 Regular reconciliation reports are produced within designated timelines |
| 3. Enter credit transaction into journals | <ul style="list-style-type: none"> 3.1 Credit transactions are entered into journals 3.2 Discrepancies between transaction documentation and account entries are identified 3.3 Journals are cross-checked and proofed 3.4 Errors in documentation are rectified |
| 4. Maintain creditors and debtors systems | <ul style="list-style-type: none"> 4.1 Transactions are entered into individual debtor and creditor accounts 4.2 Discrepancies are identified in individual debtor and creditor accounts 4.3 Errors in documentation are rectified or referred to the nominated person for action 4.4 Schedule of debtors and creditors is prepared and reconciled within designated timelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 1 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|---|--|
| Cash journals | may include cash payments journal; cash receipts journal. |
| Transactions | may include day-to-day expenses; purchases paid by cheque; withdrawal of cash by owner; payments to creditors; interest charges and bank fees; capital contributions in cash by owner; payments received by debtors; cash sales; commission; interest revenue. |
| Source documents | may include cheque butts; bank statements; cash register roll; receipts. |
| Cross checking and proofing | may include checking accuracy of data against source documents; checking totals. |
| Reporting errors to nominated person/section for resolution | may include informing supervisor; accounts department. |
| Checking for accuracy with bank statement | may include matching credit column of bank statement to cash receipts journal; matching debit column of bank statement to cash payments journal. |
| Entering direct debits and credits into cash payment/receipt journal | may include checking source documents (e.g. cheque butts, bank statements); creditors (accounts payable); debtors (accounts receivable); purchases; sundries; referencing to chart of accounts. |
| Discrepancies | may include bank charges; interest; dishonoured cheques; errors in transposing between source documents and journals. |

| | |
|---|--|
| Resolution procedures | may include adding bank charges to cash payments journal; adding interest revenue to cash receipts journal; entering amount of dishonoured cheque in appropriate journal (e.g. Deduct in Cash Receipts Journal, General Journal entry); checking source documents for accuracy of transposing data; adjusting the journal as appropriate; totalling adjusted journals; prepare Bank Reconciliation Statement to record unrepresented cheques and deposits not yet processed. |
| Regular reconciliation reports | may include once a month; as bank statements arrive. |
| Designated timelines | may include deadline set by supervisor; deadline set by accounting department; enterprise deadline. |
| Credit journals | may include sales journal; purchases journal; sales returns journal; purchases returns journal. |
| Transaction documents | may include sales invoices; purchase invoices; sales credit notes; purchase credit notes. |
| Cross checking and proofing journals | may include checking for accuracy of transposed data; checking against source documents; checking by supervisor. |
| Rectifying errors | may include careful noting of errors; informing supervisor'; correcting errors following enterprise policies and procedures. |
| Individual debtor and creditor records | may include debtors' subsidiary ledger; debtors' schedule; creditors' subsidiary ledger; creditors' schedule. |
| Transaction journals | may include sales and sales returns journal/s; cash receipts journal; purchases and purchase returns journal/s; cash payments journal. |
| Identifying discrepancies in accounts | may include careful cross checking between accounts and source documents; proofreading. |
| Preparation and reconciliation of schedule within designated timelines | may include deadline set by management; deadline set by accounts department; deadline set by supervisor; monthly. |

EVIDENCE GUIDE

Critical aspects

- Range of cash journals are identified and their purpose and function understood.
- Appropriate source documents are identified.
- Relevant information within source documents is identified.
- Relevant information is transferred accurately into cash journals.
- Journals are cross checked and checked against source documents for accuracy.
- Errors are identified.
- Corrections within own scope of responsibility are made according to enterprise policies and procedures.
- Corrections outside of scope of own responsibility are referred to the appropriate authority.
- Cash journals are totalled accurately according to enterprise policies and procedures.
- Information is recorded in chronological order.
- Cash is handled according to enterprise policies and procedures.
- Different credit journals are identified and their purpose and function understood.
- Information from source documents is transferred accurately into credit journals.
- Credit journals are cross-checked , proofread and checked against source documents to ensure they are accurate.
- Errors in credit journals are reported to appropriate person and rectified according to enterprise policies and procedures.
- Discrepancies between transaction documentation and account entries are identified.
- Accounting records are checked for accuracy against the bank's accounting records.
- Reconciliation occurs according to enterprise policies and procedures.
- Direct debits and credits are entered into cash journals accurately.
- Discrepancies are identified and if within own scope of responsibility are resolved, or are referred to an appropriate authority.
- Bank charges and interest are identified and recorded in the cash journal.
- Adjustments are made to the cash journal to account for discrepancies and differences between the bank statement and the journal as directed.
- When debtors' cheques are dishonoured cash receipts journal is adjusted accordingly.
- Bank reconciliation statements are prepared accurately within designated timelines.
- Time is allowed for cheques to clear and be credited.
- The total on the adjusted bank balance on the bank reconciliation statement matches the total in the enterprise's ledger.
- Regular reconciliation reports are produced within designated

timelines.

- Debtor's information is entered into individual debtor's subsidiary ledger.
- Creditor's information is entered into individual creditor's subsidiary ledger.
- Discrepancies are identified in individual debtor and creditor accounts.
- Errors are reported to appropriate person and rectified according to enterprise policies and procedures.
- Debtors' and creditors' schedule is prepared according to enterprise policies and procedures.
- Schedule is reconciled within designated timelines.
- Appropriate Australian Accounting and Auditing Standards are adhered to.
- Any irregularities are referred to an appropriate authority and clarification is sought in relation to any necessary directions.

Context of assessment

Evidence of competency can be met in different situations, including:

- on-the-job assessment
- off-the-job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a practice agency or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Scope of application

This unit is relevant across all areas of real estate business.

Required workplace performance

The work will generally involve some initiative within broad parameters established by agency and property marketing strategies.

Resources required for assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- cash journals
- credit journals
- debtors' and creditors' ledgers
- workplace reference materials such as procedural manuals and enterprise policy
- calculator
- computer equipment and relevant software

Consistency in performance

This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Underpinning knowledge

- Enterprise accounting system and procedures
- Enterprise policies and procedures across the range of tasks required
- Relevant source documents and information contained within source documents
- Definition of credits/creditors and debits/debtors
- Cross-checking techniques
- Limit of scope of own responsibility
- Australian Accounting and Auditing Standards
- Relevant legislation

Underpinning skills

- Literacy: reads and understands an enterprise's financial procedures; selects and applies the procedures and strategies needed to perform a range of tasks after reading appropriate texts; follows sequenced written instructions
- Numeracy: uses knowledge of mathematical concepts; calculates with time; interprets, compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts
- Problem-solving: uses some approximation with reference to relevant experience to check for discrepancies
- Communication: listens to and follows oral instructions; questions to clarify information
- Proofreading: checks calculations
- Accuracy in entering transactions
- Maintenance of complete schedules of debtors and creditors

BSAFIN302B**Unit Descriptor****Monitor cash control for accounting purposes**

This unit covers monitoring cash flow, making and receiving payments, debtors and creditors and following up accounts.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Receive and document payments/takings | 1.1 Cash is correctly counted and, where applicable, correct change is given 1.2 Cheque and credit card payments are verified with the nominated person/department prior to acceptance 1.3 Receipts are accurately completed and issued |
| 2. Check and despatch invoices to debtors | 2.1 Debtor statements are checked for accuracy of content 2.2 Invoices are validated against financial records 2.3 Any noted discrepancies are rectified 2.4 Debtor invoices are despatched within designated timelines |
| 3. Follow up outstanding accounts | 3.1 Outstanding accounts are collected within designated timelines 3.2 Credit terms are reviewed and controlled to ensure payment within designated timelines 3.3 Debtors' ledger is maintained accurately to reflect the correct situation 3.4 Credit terms are reviewed when debtor accounts are rectified |
| 4. Check and despatch payments to creditors | 4.1 Payment documentation is checked for accuracy of information and despatched to creditors within designated timelines 4.2 Cash, cheque and credit card payments are made according to enterprise guidelines 4.3 Creditors' statements are reconciled with accounting records 4.4 Relevant data is corrected in creditor's account |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 1 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Correctly counting cash and giving correct change | may include counting cash in customer's presence; leaving cash in view of customer whilst entering transaction; counting change before cash is put into register; counting out change with customer; checking notes are not stuck together. |
| Verifying cheque payments | may include cheque is signed; dated with current date; figures and words match; checking cheques are written to correct payee; following enterprise procedures for accepting cheque payments. |
| Verifying credit card payments | may include checking customer's signature against sample signature; checking expiry date of card; checking against stolen credit card list; following enterprise policies and procedures for accepting credit card payments. |
| Nominated person/department | may include supervisor; credit card authorisations; bank; enterprise authorisations department. |
| Accurately issuing receipts | may include recording date payment was received; writing amount of money received (in words and figures); creating a receipt number; documenting payer; documenting payee; signature of person receiving money or the designated person; brief description of the transaction; producing two copies of receipt; issuing original receipt to person making payment; receiver keeping duplicate. |
| Debtor statements | may include manual system computerised system; name and address of supplier; name and address of client/debtor; month to which statement is applicable; opening balance if applicable; information about any sales, sales returns, credit, forward orders and payments which have occurred throughout the month; final balance with overdue details if appropriate; any payments received allocated on an invoice by invoice basis; discount policy. |
| Checking accuracy of content | may include particulars of statement are correct; calculations are correct; information in statement is clear and reliable; data matches that found in individual debtor's subsidiary ledger account. |
| Validating invoices | may include invoice has been printed in duplicate to provide all details according to legislative requirements; checking the goods were ordered by the debtor; checking the goods have been or are being sent to the debtor; all calculations and extensions are correct; checking terms of the invoice are correct; completing credit check prior to giving credit to debtor; credit has not been extended beyond an existing debtor's credit limit; supervisor or another independent person checking invoices; validating person signing validation slip. |

| | |
|---|---|
| Discrepancies | may include reporting error to supervisor; correcting error before invoice is despatched; notifying debtor if invoice has already been forwarded; crediting debtor's account for amount of incorrect invoice; producing and dispatching correct invoice. |
| Despatched within designated timelines | may include despatched with the goods; despatched as soon as possible after debtor purchases goods; enterprise deadline. Collecting outstanding accounts within designated timelines may include within agreed period; within enterprise deadline; by month end. |
| Corrective action | may include follow up letter; telephone call; fax; visit; suspension/cancellation of credit terms; referral to debt collection agency. |
| Credit terms are reviewed and controlled | may include on a weekly basis to highlight slow and non-payers; reducing the amount of credit available to the debtor; communicating with debtor; charging interest to outstanding accounts. |
| Debtors' ledger is maintained accurately | may include identifying how long an account has not been paid; allocating payments to the oldest balances first; allocating payments to the individual invoice. |
| Payment documentation | may include cheque; credit card details; cash; direct debit advice. |
| Accuracy of information | may include matching purchase order details against delivery docket, invoice or credit note; checking all calculations and extensions are correct. |
| Despatched within designated timelines | may include within agreed period; monthly; enterprise deadline. |
| Payments made according to enterprise guidelines | may include follow enterprise policies and procedures for drawing cheques/ using credit card; having cheques signed; sending remittance advice with cheque/credit card. |
| Reconciling with accounting records | may include matching creditor statement with invoices received; only paying on the invoice if the invoice appears on the statement |
| Correcting relevant data | may include notifying creditor immediately; notifying in writing; requesting an amended invoice prior to payment; notifying supervisor; adjusting relevant accounting records. |

EVIDENCE GUIDE

Critical aspects

- When customer pays by cash, cash is counted in customer's presence.
- Cash is left in full view and change is counted out correctly, if applicable.
- When customer pays by cheque, cheque is checked to ensure it is signed, dated, and the correct amount is written in both words and figures.
- When customer pays by credit card expiry date, stolen credit card list and expiry date are checked.
- Cash, cheque and credit card takings are documented correctly.
- Receipts are completed accurately according to enterprise policies and procedures.
- Receipts are issued immediately.
- Invoice is prepared and checked for accuracy.
- Completed invoices are checked for errors and any errors within scope of own responsibility are corrected according to enterprise policies and procedures.
- Errors outside own scope of responsibility are referred to an appropriate authority for rectification.
- Prepared invoice is checked by appropriate person.
- Correct invoices are despatched promptly within designated timelines.
- Debtor statements are checked to ensure all details are correct.
- Outstanding accounts are monitored and are collected within designated timelines.
- Debtor is notified/reminded of enterprise's account payment policies, if appropriate.
- Debtors ledger is maintained correctly and reflects the current situation.
- Debtors' payments are controlled according to enterprise policies and procedures.
- Debtors are balanced and reconciled according to enterprise policies and procedures.
- Enterprise's credit terms are understood and applied.
- Goods received are checked against all documentation including invoice.
- Checks to ensure that the delivery docket, invoice and credit note match the purchase order.
- Invoices are reconciled with statement according to enterprise policies and procedures.
- Cash payments are only made when written instructions are received and receipt is retained.
- When mailing cheque, remittance advice is included with payment.
- Credit card payments are made according to enterprise policies and procedures.
- Creditors are notified immediately any errors in creditors' invoices are found and relevant data is corrected in creditor's account.
- Payments made to creditors are accurate and recorded.
- Appropriate legislative procedures are followed.

| | |
|--|--|
| Context of assessment | <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on-the-job assessment • off-the-job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a practice agency or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times) <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports |
| Scope of application | This unit is relevant across all areas of real estate accounting. |
| Required workplace performance | The work will generally involve some initiative within broad parameters established by agency and property marketing strategies. |
| Resources required for assessment | <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • workplace reference materials such as procedural manuals and enterprise policy • cash journals • general journals • subsidiary ledgers or general ledger • receipt books • credit card facilities • calculator • computer equipment and relevant software |
| Consistency in performance | This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved. |

Underpinning knowledge

- Enterprise accounting system and procedures
- Enterprise policies and procedures across the range of tasks required
- Relevant source documents and information contained within source documents
- Definition of credits/creditors and debits/debtors
- Cross-checking techniques
- Limit of scope of own responsibility
- ATO regulations
- Consumer law
- Australian Accounting and Auditing Standards

Underpinning skills

- Literacy: reads and understands an enterprise's financial procedures; follows sequenced written instructions; selects and applies the procedures and strategies needed to perform a range of tasks; uses basic model to produce accurate invoice
- Numeracy: uses knowledge of mathematical concepts; calculates with time; compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts; adheres to designated timelines
- Communication: listens to and follows oral instructions; questions to clarify information; refers errors or discrepancies to appropriate person
- Proofreading: checks calculations
- Accurate documentation of cash, cheque and credit card takings, payments and invoices
- Accurate monitoring and review of outstanding accounts

BSAFIN501B**Manage payroll records for employee salaries and statutory record-keeping purposes****Unit Descriptor**

This unit covers responsibilities for calculating and processing employee salaries, group certificates and relevant taxation payments.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------------|--|
| 1. Prepare payroll data | <ul style="list-style-type: none"> 1.1 Gross pay and annual salaries are accurately calculated from information contained in nominated industrial awards, contracts and government legislation 1.2 Statutory and voluntary deductions are accurately calculated from relevant documentation 1.3 Payment due to employees is provided to payroll processor for calculation within designated timelines |
| 2. Process payment of salaries | <ul style="list-style-type: none"> 2.1 Salaries and wages are authorised for payment 2.2 Salaries, wages and deductions are reconciled according to enterprise procedures 2.3 Security procedures are established and monitored to ensure confidentiality and security of information 2.4 Salary, wage and related enquiries are dealt with promptly and courteously 2.5 Systems are established so that records are kept for the period determined by government legislation |
| 3. Administer PAYE salary records | <ul style="list-style-type: none"> 3.1 Employee group certificate amounts are prepared and reconciled from salary records 3.2 Declaration forms for new and existing employees are processed in accordance with Australian Taxation Office (ATO) requirements 3.3 Payments to government authorities are accurately prepared and despatched in accordance with the relevant government legislation 3.4 Group tax amounts are calculated and/or transcribed and payments made in accordance with ATO procedures 3.5 Periodic deductions are forwarded to nominated creditors within designated timelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|--|--|
| Pay and salaries accurately calculated | may include appropriate pay structure; time sheets; employment history cards; sick leave; annual leave loading; long service leave; penalty rates; overtime; allowances; deductions; salary packaging items. |
| Nominated industrial awards, contracts and government legislation | may include Federal/State awards; enterprise agreements; certified/workplace agreements. |
| Statutory and voluntary deductions | may include payroll tax; superannuation levy; Medicare levy; union fees; insurance; PAYE tax; HECS. |
| Relevant documentation | may include employment declaration form; authorisation from employee; formally agreed variations to employee authorisation; Superannuation Guarantee Act; relevant legislation. |
| Payroll processor | may include enterprise accountant; external accountant; outsourced payroll company; payroll officer. |
| Within designated timelines | may include stipulated time period before pay is due to employees; stipulated time period before employee departs enterprise. |
| Authorising salaries and wages for payment | may include signature of authorised enterprise officer; cross-checking salary and wage amounts; permission to draw salary/wages cheques/cash/EFT transfer documentation; approval of cash analysis sheet. |

| | |
|--|--|
| Reconciling salaries, wages and deductions | may include checking and cross checking against source documents; checking and cross checking gross amounts equal net amounts minus deductions; checking and cross checking gross pay for enterprise equals the sum of net amounts minus the sum of deductions; checking deductions are correct; checking previous pay periods totals. |
| Security procedures | may include authorised access; computer password; back-up files; division of labour; multiple checks and balances; dual checking system. |
| Confidentiality and security of information | may include maintaining security and confidentiality of employees' details; restricting access to electronic files and locking paper-based confidential information; ensuring security of passwords/keys; separating locations of confidential information; storage of information off-site. |
| Salary, wage and related enquiries | may include pay, leave, deductions queries; late pay; overpay; underpay; superannuation; HECS; Bonus. |
| Systems for keeping records | may include manual filing system; computer files; back-up files; file register; archives. |
| Period determined by government legislation | may include 5 years - Australian Tax Office legislation; 7 years - Australian Securities Commission requirement. |
| Salary records | may include employee files; employee time keeping systems; manual payroll system; computer payroll system, spreadsheets; end of pay period reports; statutory deductions. |
| Preparation and reconciliation of employee group certificates | may include totalling period gross/net salary and deductions/allowances; recording employee tax file numbers; recording statutory and voluntary superannuation contributions; Fringe Benefits Tax. |
| Accurately processing declaration forms | may include tax file number; employee personal details; enterprise details; wage/salary details; level of tax; compliance with ATO requirements. |
| Payments to government authorities | may include payroll tax; Fringe Benefits Tax; PAYE; Medicare levy; child maintenance payments. Relevant government authorities may include ATO; Centrelink. |
| Relevant legislation | may include ATO; Superannuation Guarantee Act; corporations law |
| ATO procedures | may include dates payments are due; appropriate forms. |

Nominated creditors may include salary packaging; union; membership organisations; health funds; vehicle leasing organisations; government agencies; ATO.

EVIDENCE GUIDE

Critical aspects

- Gross pay and annual salaries are calculated accurately.
- Statutory and voluntary deductions are correct and accurately recorded.
- Relevant awards, legislation and contracts are complied with.
- Documentation used to calculate pay and deductions is authentic and current.
- Payroll is authorised by appropriate personnel.
- Payroll is prepared in a timely manner to ensure employees are paid on time and with correct pay advice slips.
- Reconciliation of salaries, wages and deductions is accurate.
- Any irregularities are identified and rectified or referred to appropriate personnel for rectification.
- PAYE salary records are maintained and processed accurately.
- Enquiries regarding salary/wages are answered clearly and any misunderstandings clarified.
- Issues that cannot be rectified are referred to appropriate personnel for rectification.
- Records are kept according to government legislation requirements.
- Confidentiality of records is maintained.
- Appropriate legislative procedures are followed.
- Group certificates are accurately prepared in accordance with ATO requirements.
- Employment declaration forms are accurately completed and processed in accordance with ATO requirements.
- Government authority payments are accurate and prepared in a timely manner to ensure the enterprise complies with authority regulations.
- All payments to internal and external parties are accurate and appropriately recorded.
- Creditors receive correct payment within timelines.
- Relevant legislative requirements are understood and adhered to.

| | |
|--|--|
| Context of assessment | <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on-the-job assessment • off-the-job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a practice agency or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times) <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports |
| Scope of application | This unit is relevant across all areas of payroll record-keeping. |
| Required workplace performance | The work will generally involve some initiative within broad parameters established by the agency. |
| Resources required for assessment | <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • enterprise accounting system • paper-based/electronic payroll system • relevant ATO legislation • Australian Accounting and Auditing Standards • Superannuation Guarantee Act • HECS • relevant industrial awards • certified/workplace agreements • enterprise contracts • calculator |
| Consistency in performance | This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved. |

Underpinning knowledge

- Enterprise policies and procedures across the full range of tasks required
- Confidentiality and security procedures
- ATO legislative requirements
- Relevant government and statutory bodies in relation to payroll
- Enterprise's accounting system
- Superannuation Guarantee Act
- Relevant industrial awards

Underpinning skills

- Literacy: follows complex financial procedures; follows and writes detailed instructions
- Numeracy: uses financial formulae, calculates gross and net pay, compares differing rates of pay over a given time span of the same nature, prepares cash analysis sheets, reconciles figures and rectifies anomalies
- Communication: answers enquiries, explains and resolves discrepancies with employees
- Problem-solving skills: reconciles figures, resolves employees' enquiries; uses processes flexibly and interchangeably
- Proofreading: checks for accuracy
- Time management: adheres to designated timelines

BSAFIN502B**Monitor and control disbursements within a given budget****Unit Descriptor**

This Unit of Competency is adapted from AAACE FIN503. This Unit covers procedures for allocating funds and keeping the appropriate records of fund expenditure.

This unit can be assessed alone or in combination with other units making up a job role.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Disburse funds | 1.1 Funds for programs and services are identified 1.2 Funds are allocated and available within the required timeframe 1.3 Unallocated or unused funds are allocated according to management direction to meet changing requirements |
| 2. Administer financial control systems | 2.1 Funds expenditure is detailed in financial control systems 2.2 Commonly accepted measures for controlling expenditure are included in system 2.3 Appropriate program and services expenditure assessment is able to be made on systems 2.4 Statutory regulatory, audit and policy compliance is understood and maintained by staff |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT**Funds for programs and services may include:**

- general budget allocation
- additional funds for particular projects
- self-generated funds
- fundraising requirements
- project grants
- funds received for winning tenders
- Enterprise procedures and policies

Ensuring availability and allocation of funds may include:

- completing funds requisition
- gaining approval from upper management
- ensuring contracts are signed in a timely manner to guarantee transfer of funds from granting body
- preparing proposal for approval by Board

Allocation of unallocated or unused funds may include:

- diversion to a similar project
- winding up project and returning funds to granting body

Changing requirements may include:

- change of priorities
- new research/findings becoming available
- changes in external market
- availability of new technology/equipment/materials

Detailing of funds expenditure may include:

- daily/weekly expenses
- records of purchases/disbursement
- proof of authorisation to purchase
- salary details
- miscellaneous costs

Financial control systems may include:

- cheque requisition forms
- specific project account
- purchase orders
- project funds expenditure record
- record of expenditure against total budget
- project funds reconciliation system

Commonly accepted measures for controlling expenditure may include:

- obtaining multiple quotes for services
- limiting unauthorised levels of expenditure
- identifying alternative resources
- redistributing resources
- utilising existing resources
- careful monitoring of budget
- variance analysis

Recording mechanism/systems

- Recording mechanism/systems
- paper-based
- electronic
- enterprise accounting system

Expenditure assessment may include:

- maintaining a running tally of expenditure
- regularly updating records
- establishing electronic reporting facility within recording system
- ensuring records of expenditure are able to be audited

Statutory regulatory, audit and policy compliance requirements may include:

- Australian Auditing and Accounting Standards
- ATO requirements
- contract requirements
- enterprise policies and procedures

EVIDENCE GUIDE**Critical aspects:**

- an understanding of financial systems is demonstrated
- funds are secured and allocated to budgets and programs
- the funds for disbursement and control are clearly defined
- disbursement of funds is clearly and accurately recorded
- disbursement of funds meets enterprise policies and procedures and any external funding/ statutory body requirements
- no funds are misappropriated
- appropriate measures to control the disbursement of funds are implemented and monitored
- staff are clearly informed of allowable disbursements and required reporting and recording procedures
- any irregularities are promptly investigated and resolved or referred to an appropriate authority for resolution
- the status of the total funds against disbursements can be determined throughout the project
- an understanding and the correct application of the relevant legislation and policy with regard to the disbursement of funds is demonstrated
- unallocated funds are appropriately distributed
- auditing requirements are met
- relevant legislative and statutory requirements are understood and adhered to

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- enterprise manuals, texts/references
- budgets for programs/services
- enterprise accounting system
- paper-based/electronic system for recording disbursements
- Australian Accounting and Auditing Standards
- relevant ATO legislation

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills**Knowledge**

- enterprise policies and procedures across the full range of tasks required
- ATO legislative requirements
- relevant government and statutory bodies
- enterprise's accounting system
- acceptable measures for controlling expenditure
- Australian Accounting and Auditing Standards
- budgetary processes
- enterprise's policies and procedures for the disbursement of funds

Skills

- literacy: follows complex financial procedures; writes detailed instructions organised sequentially
- numeracy: uses financial formulae; demonstrates knowledge of mathematical concepts; represents a range of data appropriately including tables, graphs; interprets and uses graphical representation as the basis for inference and prediction; calculates and contrasts monthly income from average sales
- communication: presents oral/written financial report; answers questions and provides information; discusses and explains implications of financial procedures and forecasts
- problem solving: selects and applies a wide range of mathematical strategies flexibly to generate solutions; decides on degree of accuracy appropriate to the activity; uses developed estimating skills to check calculations and outcomes

BSAINF401B**Supervise an established records system to ensure its integrity****Unit Descriptor**

This Unit covers supervising the creation of new files, the maintenance of the enterprise's system, including the security of confidential files and training new and existing staff in using the filing system.

This unit can be assessed alone or in combination with other units making up a job role.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Maintain existing filing arrangements | 1.1 New documents are allocated to their designated category 1.2 Issue and return of documents is monitored to ensure the integrity of the system is maintained 1.3 Documents are archived/removed/updated to ensure that maximum space is available to house current records |
| 2. Ensure distribution of files and records | 2.1 Required files are correctly identified and located 2.2 Files are dispatched to the nominated person or section within designated timelines 2.3 File and document movements are monitored and recorded 2.4 Documents are maintained in good condition and in correct location |
| 3. Maintain security of filing system | 3.1 Confidential files are kept separate from general files 3.2 Confidential files are only accessed by nominated persons 3.3 Security system is monitored to ensure issued files are traceable at all times |
| 4. Train staff in records management | 4.1 Staff training needs are determined 4.2 Training is provided for new staff in records system 4.3 Retraining for existing staff organised if necessary |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 1 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 1 |

RANGE STATEMENT

Allocating new documents to their designated category may include:

- creating new files
- appropriately naming new files
- correctly labeling or coding new files
- cross-referencing files
- registering new files before filing
- indexing and recording new files before filing
- filing new files according to the particular classification system in use (alphabetical, numerical, subject, location)

Designated categories may include:

- financial
- project categories
- legal
- administrative
- sales and marketing
- historical or archived

Monitoring the issue of documents may involve:

- creating/maintaining a paper-based file register
- creating/maintaining a file database
- creating/maintaining a card index system
- passing slips

Monitoring the return of documents may involve:

- creating/using a 'tickler' or follow-up file reminder system
- using a paper-based or electronic calendar to implement a reminder system
- checking the file movement register, outcard or computer database
- contacting the person who borrowed the file
- recording all misplaced or lost files

Monitoring and tracking lost or misplaced files may involve:

- checking current location of files (eg. mistakenly filed inside another file)
- checking file in-tray
- correcting mistake in initial categorising, indexing or filing of file
- checking that the label, tag, or other file identification marker is securely fastened
- checking inactive or archival records

Records which need to be archived/removed/updated may include:

- inactive files
- closed files
 - kept for legal/reporting purposes
 - kept for research/historical purpose
 - to be destroyed
- documents which are too large to be workable in their current state
- out of date files (eg. stock, account and sales records, out of date client address and information details, out of date policy, procedures, regulations or legislation records)

Archiving/removing/updating records may include:

- transferring records from the active file system to secondary storage
- transferring files at regular intervals
- routine checking for dead or inactive files
- implementing the double file method
- programming the computer to periodically archive or delete files
- compression of computer files prior to archiving
- clearly labeling and indexing records when relocating
- separating and restricting access to confidential or sensitive inactive/dead files
- storing duplicate copies of records off-site
- culling and/or separating files
- updating records (eg. out of date stock, account and sales records, out of date client address and information details, policy, procedures, regulations or legislation records when they change)
- using a combination of the above methods

Correctly identifying and locating required files may include:

- identifying and locating correct file by
 - storage medium
 - index
 - category
 - cross-reference
 - status (eg. inactive, archived, dead)

Methods used to dispatch files may include:

- internal mail
- hand delivery
- postal service
- facsimile transmission
- courier service
- computer based files via email

The nominated person/section may include:

- internal
 - the supervisor
 - another person within the - department
 - a person outside the department but within the enterprise
- external
- request for information outside the enterprise

Designated timelines may include:

- urgent (eg. for a same day meeting, urgent request)
- by the end of the day
- by tomorrow
- by next week

Monitoring and recording the movement of documents may include:

- checking transfer slips
- recording files in transit within internal mail system
- checking file removal documentation is completed
- maintaining the file register, outcard or computer database
- conducting a regular census or inventory

Maintaining documents in good condition may include:

- carefully transporting files
- keeping record storage areas clean/free from smoke, dirt, dust and food
- maintaining storage areas
- ensuring file contents are appropriately secured within file
- repairing/replacing damaged records or files
- providing protective file covering
- allowing for expansion to file without causing damage
- chronologically ordering documents within the file

The correct location may include:

- archive boxes
- filing cabinets
- microfiche/microfilm
- computer-based records
- CD ROMs
- floppy disks

Maintaining documents in the correct location may include:

- archiving/removing/updating documents in the current filing system
- conducting a census/inventory
- updating the file index, file register and/or computer database
- maintaining file details (eg. file code, keywords and dates are logical, correct and in the right order)

Confidential files may be:

- client records
- personnel details (salary details, personal information)
- job application records and reports
- product development records
- legal matters and contracts
- enterprises financial details

Monitoring the security system may include:

- recording all signed authorisations
- locking restricted files in a secure location
- keeping the keys in a secure location
- using outcards, file markers, passing slips, and/or file register to monitor paper based confidential files and documents
- prioritising the return of due and overdue confidential files

Determining staff training needs may include:

- ensuring all staff are familiar with the records system
- consultation with staff (eg. questionnaire, individual meetings, memo)
- monitoring staff performance to identify training needs

Providing training in records management may involve:

- informing all new staff about the records management system
- creating and distributing relevant records management information
- discussing and demonstrating the records management system
- preparing a training outline and session
- ensuring access to training equipment and resources
- determining the training venue and time
- monitoring the trainees' level of comprehension
- providing feedback to the trainees

planning for further training on the job

Retraining for existing staff may involve:

- informing staff of revisions/updates
- reminding staff of the system requirements and their responsibilities
- providing updates at staff meetings
- sending memos with updated or refresher information on the records management systems
- holding workshops or information sessions on the records management systems

EVIDENCE GUIDE

Critical aspects:

- enterprise's policies and procedures are understood and followed
- a detailed understanding of the enterprise records management system is demonstrated and is clearly communicated to others
- demonstrated understanding of the responsibilities of supervising an established records management system, including:
 - new files are named, classified and filed in the appropriate location and sequence
 - information is appropriately recorded and filed
 - file names are appropriate and takes into account the views and needs of record users
 - labeling and coding of files is consistent with enterprise policies and procedures
 - files are cross-referenced if necessary
 - electronic files are backed up according to enterprise policies and procedures
 - life/duration of records must be identified and reasons for this is understood
 - inactive and dead files are identified and either culled or archived according to enterprise policies and procedures
 - appropriate person is consulted before destroying any file
- requested files are retrieved and distributed to the appropriate person within designated timelines
- movement of files is monitored and recorded to maintain the integrity of the system
- census or inventory is conducted at regular intervals to establish the actual location and condition of all files
- files are returned to their correct location and sequence
- files are maintained in good condition
- ensures that other people are familiar with the policies and procedures governing the records system
- restricted confidential files are identified
- restricted confidential files are tagged to indicate restricted confidential status using a security rating system and are secured in separate storage arrangements
- restricted confidential files are only distributed to authorised personnel
- restricted confidential files are locked when not in immediate use and keys are kept securely in safe location
- Freedom of Information legislation and requirements are understood
- staff requiring training are identified
- training gaps are identified, appropriate style of training is identified and training outline is developed
- new staff are informed about the records management system and its operation is demonstrated
- retraining for existing staff is organised if necessary

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as company policy, procedural manuals, records system, user guide
- filing system
- computer equipment including relevant software
- Freedom of Information legislation

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills

knowledge

- application of enterprise policies and procedures required across the full range of tasks covered
- enterprise's records management system
- Freedom of Information legislation
- common records management process
- confidentiality in relation to records management

skills

- literacy: follows and interprets enterprise procedures and policies; reads and critically evaluates texts; has developed written skills; extracts main ideas from files for accurate recording; employs a variety of strategies when interpreting text eg. creates questions, checks for accuracy of information; considers aspects of context and purpose
- numeracy: codes and classifies documents numerically
- research: selects categories by which to organise information; processes information in a systematic way; evaluates existing systems and identifies methods for improvement according to agreed principles (numbers, company directory, destination); summarises data appropriately,
- technology: uses appropriate technological materials in order to establish and maintain filing system
- problem solving: uses a variety of processes appropriately and flexibly; tracks and locates lost/misplaced files; decides where cross-checking of information is appropriate
- communication: participates in sustained oral interactions with staff; questions to clarify information; briefs and informs staff of procedures; modifies language to suit a range of audiences
- organises and delivers staff training as appropriate
- organisational: monitors systems, prepares and delivers training

BSAORG301B**Coordinate own work schedule with that of others to achieve agreed team/section goals****Unit Descriptor**

This unit covers negotiating work schedules to coordinate with the work team and to achieve team tasks within timelines.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Develop own work schedule to achieve agency team goals | <ul style="list-style-type: none"> 1.1 Team goals are clarified and agreed upon by the team 1.2 Work schedule is negotiated and agreed upon with nominated officer and team 1.3 Timelines for achievement of priorities are determined |
| 2. Coordinate own work schedule with others | <ul style="list-style-type: none"> 2.1 Others' priorities are established in discussion 2.2 Timelines for achievement of priorities are determined 2.3 Individual tasks are prioritised in discussion with others 2.4 Tasks and priorities are reviewed with a change of instruction from a nominated officer 2.5 Tasks are completed within designated timelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 1 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | - |

RANGE STATEMENT**Enterprise's policies and procedures**

may relate to team meetings; reporting arrangements; project timelines; goal setting; business plans.

| | |
|---|---|
| Team/section goals | may include identifying enterprise goals; overall goals; specific goals; refining and/or improving existing team goals; seeking new goals. |
| Clarification | may include seeking and incorporating a contribution from each team member; recognising and understanding each team member's skills and capabilities; group discussion of the team's objectives and desired outcomes. |
| Work schedule | may include daily tasks and responsibilities; extra tasks or skills that may need to be accomplished to achieve team goals. |
| Negotiation and agreement | may include recognition of each team member's capabilities and skills; trading off certain tasks and/or responsibilities for others; a formal or informal consultation process. |
| The nominated officer | may include supervisor; team leader; manager. |
| The team | may include a group of two or more people within the office; a group of people from different departments within the organisation; internal/external clients; formal/informal structure. |
| Timelines | may relate to deadlines agreed with supervisor; deadlines agreed with team; deadlines determined by client; formal or informal agreements; group or individual processes; wall charts, whiteboard planners, electronic calendars and diaries. |
| Others' priorities | may include external clients' requirements; internal clients' requirements; enterprise goals and objectives; team member commitments. |
| Discussion | may include formal meetings; informal conversations; electronic mail, telephone or interoffice memo. |
| Prioritising | may involve structuring and sorting work tasks as effectively as possible; understanding which tasks tend to be deferred over others; delegating responsibility when appropriate; scheduling work priorities on a daily and/or weekly basis; utilising resources (e.g. action planning worksheets, monthly/weekly planners, daily time logs). |
| Resources required to complete tasks | may include a diary, whiteboard planner, wall calendar or electronic planning system; an up-to-date filing system; time; people; money; equipment; stationery. |

EVIDENCE GUIDE

Critical aspects

- Team's overall and specific goals are clarified and consensual.
- Team work schedule is developed and individual tasks are allocated.
- Tasks in individual work schedules reflect and support team goals.
- Responsibilities involved in being part of a team are understood.
- Own work schedule is subject to ongoing review and re-organisation in consultation with a supervisor or team members when necessary.
- Realistic timelines for tasks are regularly set and achieved.
- A range of planning tools and methods are understood and demonstrated.
- Work priorities are understood and competing demands are negotiated when necessary.
- The individual is able to consistently monitor the quality of own work performance.
- Any difficulties in completing tasks and/or achieving designated timelines are reported to designated person if necessary.

Context of assessment

Evidence of competency can be met in different situations, including:

- on-the-job assessment
- off-the-job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a practice agency or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Scope of application

This unit is relevant across all areas of real estate agency service.

Required workplace performance

The work will involve some initiative within broad parameters established by agency and property marketing strategies.

Resources required for assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- reference materials, such as team organisational charts and planner
- resources required in order to complete tasks
- planning tools
- business tools
- team/section work schedule
- own position description
- list of tasks
- diary
- wall planning chart
- office procedures manual
- examples of work plans developed in the enterprise

Consistency in performance

This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Underpinning knowledge

- Team goals and priorities
- The interdependence between individual tasks and team goals
- Planning resources needed to achieve tasks and goals
- Agency priorities
- Agency timelines

Underpinning skills

- Literacy: reads and understands an enterprise's goals and procedures; extracts and interprets tasks from a list; formulates a list of agenda items to be completed; reads items produced by others and questions to clarify meaning; writes short reports for a specified purpose; writes short formal letters outlining instructions for a particular routine task
- Problem-solving: adapts prior experience and examples in the selection of appropriate and efficient methods of solution; draws on personal experience, prior knowledge and mathematical knowledge within context to make predictions
- Communication: canvasses a group of people for issues and views; participates in a small group discussion to negotiate tasks and solve problems; listens to and notes individual preferences regarding arrangements for group activity; clarifies defined purposes and objectives to be achieved by working with others; coordinates own work schedule with others in the team
- Self-management: prioritises work tasks
- Time-management: achieves work tasks within designated timelines
- Self-assessment: monitors the quality of own work performance
- Ability to monitor quality
- Ability to re-prioritise timelines

BSAORG402B**Plan meetings to enable the stated objectives of the meetings to be met****Unit Descriptor**

This unit covers organising meetings, for example agendas, papers, participants and minutes, within timelines.

This unit can be assessed alone or in combination with other units making up a job role. Direct links can be made between this unit and BSAORG501B Manage meetings to achieve identified team/section goals.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Make meeting arrangements | 1.1 Requirements of meeting and participants are identified 1.2 Meeting arrangements are prepared in accordance with requirements of meeting 1.3 Participants are advised of any changes to original meeting details |
| 2. Prepare documentation for meetings | 2.1 Agenda and relevant material is identified and prepared for despatch 2.2 Documentation is checked for accuracy and any errors are corrected 2.3 Documentation is despatched to participants within designated timelines 2.4 Spare sets of documents are prepared |
| 3. Record and produce minutes of meeting | 3.1 Notes are taken to ensure an accurate record of the meeting 3.2 Minutes are produced 3.3 Minutes reflect a true and accurate account of the meeting 3.4 Minutes are checked for accuracy and approved by the nominated person 3.5 Copies of minutes are despatched to the nominated person within designated timelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | - |
| Using technology | - |

RANGE STATEMENT

Enterprise policies and procedures

may relate to meeting arrangements; agenda formats; minute-taking; meeting technology; meeting locations; catering and other requirements.

Type of meeting

may include teleconferencing; videoconferencing; annual general meeting; board meeting; formal; informal; semi-formal; staff meeting.

The requirements of the meeting and its participants

may relate to purpose of the meeting; meeting structure; number of participants; special needs of participants; specific resources and equipment required by participants.

Participants

may include internal clients (individuals, teams, consultants, committees); external clients (customers, business contacts, persons working in a similar field); a mixture of both.

Meeting arrangements

may include scheduling the date and time for the meeting; booking an appropriate venue; organising catering; organising accommodation and transport; organising appropriate communication technology; establishing costs and operating within a budget; preparing relevant documentation for participants.

Ways of advising participants of changes

may include letter; fax; email; telephone; office memo; face-to-face conversation.

Agenda

may include statement of the meeting's purpose; date, time and location of meeting; welcome; minutes of the previous meeting; matters or business arising from the minutes; correspondence; reports; major agenda items; general business; date of next meeting.

Relevant material

may relate to financial reports; chairperson's report; research reports; itemised meeting papers; draft documentation; correspondence.

| | |
|-----------------------------|---|
| Despatch | may include post; Express Post; courier; registered mail; email |
| Designated timelines | may relate to formal timeframe set by the enterprise; informal timeframe set by the administrative organiser; timeframe agreed by the participants. |
| Notes | may relate to participants who were present at or absent from the meeting (attendees and apologies); points discussed at the meeting; suggestions made at the meeting; issues raised at the meeting; decisions taken at the meeting; future action. |
| Preparing minutes | may include reading previous minutes to ascertain the appropriate format; using enterprise templates; meeting details (e.g. title, date, time, location); welcome; names of absent and attending participants; apologies sent by those absent; approval of the record of the previous minutes; matters arising from the previous meetings; correspondence; agenda items; reports; other business; date of the next meeting; lists rather than complete sentences. |
| Nominated persons | may include meeting participants, both attending and absent; internal clients (e.g. management, relevant departments, committees); external clients (e.g. interested customers, relevant consultants, key stakeholders). |

EVIDENCE GUIDE

Critical aspects

- Enterprise policies and procedures in regard to meetings are understood and followed.
- Purpose of a meeting is clarified and understood before preparation.
- Style and structure of the meeting is appropriate to the meeting's purpose.
- Common meeting terms are understood.
- Sufficient time is allowed to make the necessary meeting arrangements.
- All key participants are consulted when a meeting is scheduled.
- Meeting requirements are clarified and confirmed within timelines.
- Participants are notified as soon as possible of any changes in meeting arrangements.
- Enterprise policies and procedures in regard to meeting documents are understood and followed.
- Relevant meeting papers are checked for accuracy and presented in agenda order.
- Participants are supplied in advance with all necessary documentation.
- A spare set of meeting documents is prepared.
- The agenda is clarified with key participants.
- A draft agenda is prepared when required and sent in advance to participants.
- Efficient methods of despatch are utilised.
- A checklist is used to confirm meeting details.
- Enterprise policies and procedures in regard to minute-taking are understood.
- Minute-taking, including listing key points, suggestions and decisions, is clearly understood.
- Minutes are presented to nominated person for approval.
- Minutes are sent to all participants within designated timelines.

| | |
|--|--|
| Context of assessment | <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on-the-job assessment • off-the-job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a practice agency or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times) <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports |
| Scope of application | This unit is relevant to agency meetings. |
| Required workplace performance | The work will generally involve some initiative within broad parameters established by the agency. |
| Resources required for assessment | <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • reference material in regard to meeting venues, catering companies, transport suppliers • names and contacts for meeting participants • office supplies and equipment • equipment (e.g. computer and software, meeting technology) |
| Consistency in performance | This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved. |
| Underpinning knowledge | <ul style="list-style-type: none"> • Enterprise procedures and policies in regard to meetings, agendas and minute-taking • Meeting terminology • Meeting structures • Meeting arrangements • The minute-taking format • The agenda format • The subject matter of meetings |

Underpinning skills

- Literacy: interprets enterprise's goals for the team; writes clear and detailed instructions, organised sequentially for group members to complete specific activities; writes and compiles relevant agenda items and records minutes; makes notes from spoken texts in meetings; uses a variety of changes strategies for planning, reviewing and proofreading documentation
- Communication: co-ordinates and consults with participants; orally presents written report with a number of defined sections; listens and responds constructively to the team; defines and monitors objectives to be achieved taking into account different perspectives; clarifies points made in meetings
- Research: selects categories by which to organise information and assesses information for relevance, accuracy
- Time-management: allows sufficient time to prepare for and conduct meetings

BSAORG501B**Manage meetings to achieve identified team/section goals****Unit Descriptor**

This unit covers managing the preparation of meetings, including the materials, the venue, chairing the meeting, preparing the minutes and reporting to management, all within timelines.

This unit can be assessed alone or in combination with other units making up a job role. Direct links can be made between this unit and BSAORG402B Plan meetings to enable the stated objectives of the meetings to be met.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|---|
| 1. Organise meetings | <ul style="list-style-type: none"> 1.1 Purpose of meeting is clarified with management 1.2 Agenda is developed in line with stated purpose 1.3 Relevant participants are identified 1.4 Time and venue of meeting are arranged 1.5 Participants are notified 1.6 Meeting papers are prepared from relevant sources 1.7 Meeting papers are despatched to participants within designated timelines |
| 2. Conduct meetings on behalf of management | <ul style="list-style-type: none"> 2.1 Meetings are chaired in accordance with enterprise procedures 2.2 Minutes of meeting are recorded, circulated and filed 2.3 Outcomes of meeting are recorded and reported to management within the designated timelines |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 1 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|---|--|
| Enterprise policies and procedures | may relate to meeting arrangements; chairing protocol; agenda formats; recording systems. |
| Type of meeting | may include teleconferencing; videoconferencing; annual general meeting; board meeting; formal; informal; semi-formal. |
| Management | may relate to a board or steering committee; supervisors/team leaders from different departments. |
| Agenda | may relate to standard enterprise format; less formal listing of items; draft agenda distributed to participants for feedback before the final agenda is prepared. |
| The stated purpose | may relate to range of business items; setting of enterprise/team goals; planning and development of a project; progress of a project; discussion forum for internal/external clients. |
| Relevant participants | may relate to internal clients (e.g. individuals, teams, consultants, committees); external clients (e.g. customers, business contacts, persons working in a similar field); a mixture of both. |
| Meeting | papers may include financial reports; chairperson's report; research reports; draft documentation; correspondence. |
| Relevant sources | may include internal clients; external clients; external organisations (e.g. consultants, research organisations); enterprise files; meeting participants. |
| Designated timelines | may include time frame decided by participants; formal time frame set by the enterprise; informal time frame set by the administrative organiser; project timelines; contractual obligations. |
| Chairing of meetings | may include welcoming participants; reading apologies from those absent; asking for comments; introducing the agenda items; acknowledging suggestions, decisions and plans for action. |
| Minutes of meeting | may include reading the enterprise's previous minutes to ascertain the appropriate format; meeting details (e.g. title, date, time and location); welcome to the meeting; names of absent and attending participants (apologies and attendees); acknowledging apologies sent by those absent; approving the record of the previous minutes; matters arising from previous meetings/minutes; correspondence; agenda items; reports; other business; date of the next meeting; lists rather than complete sentences. |

Recording and reporting the outcome of meetings

may include minutes presented in a format consistent with enterprise procedure; report of meeting outcomes circulated to all participants; report of meeting outcomes circulated to all relevant internal and external persons; use of various forms of communication (e.g. written correspondence, email, fax).

EVIDENCE GUIDE**Critical aspects**

- Enterprise's policies and procedures in regard to meetings, chairing procedures and minute-taking are clearly understood.
- Purpose of meeting is clarified and understood before arrangements are made.
- Ability to prepare an agenda consistent with the meeting's purpose is demonstrated.
- Required participants are identified.
- Meeting's date, time and venue are arranged.
- Participants are notified of the meeting arrangements within designated timelines.
- Confirmation of participants' attendance is sought.
- Participants requirements are clarified and confirmed.
- Meeting papers are accurately sourced and prepared within designated timelines.
- Relevant documentation is supplied to participants within designated timelines.
- Meetings are conducted on time.
- Chairing procedures are clearly understood.
- Meetings are chaired according to agenda and enterprise requirements.
- Minutes are accurately recorded in the appropriate format.
- Minutes are filed appropriately.
- Minutes are circulated to relevant persons within designated timelines.

| | |
|--|--|
| Context of assessment | <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on-the-job assessment • off-the-job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a practice agency or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times) <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports |
| Scope of application | This unit is relevant to agency meetings. |
| Required workplace performance | The work will involve some initiative within broad parameters established by the agency. |
| Resources required for assessment | <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • reference material in regard to meeting venues, catering, transport suppliers • names and contacts for meeting participants • office supplies and equipment • computer and relevant software |
| Consistency in performance | This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved. |
| Underpinning knowledge | <ul style="list-style-type: none"> • Enterprise procedures and policies in regard to meetings, chairing and minute-taking • Meeting terminology, structures and arrangements • Minute-taking format • Agenda format • Chairing format • Enterprise's record and circulation systems • The subject matter of meetings |

Underpinning skills

- Literacy: interprets enterprise's goals and directions; demonstrates well developed writing skills to express complex relationships between ideas and purposes
- Report-writing: selects categories by which to organise information, and assesses information for relevance and accuracy; identifies and elaborates on key agenda items; sources additional information as required
- Communication: takes part in sustained and complex interpersonal exchanges; interacts well with others; listens to and incorporates/encourages feedback; conducts oral presentation to a group; answers questions; manages and works with a group to construct an action plan to develop an effective work climate; consults participants; chairs meetings
- Numeracy and time-management: allows sufficient time to prepare for meetings; forecasts predictions; uses developed estimating skills to check calculations and outcomes
- Problem-solving: chooses appropriate methods of solution from a range of available methods

BSATEC301B**Use the advanced functions of a range of office equipment to complete daily tasks****Unit Descriptor**

This unit covers coordinating the advanced functions of a range of office equipment (for example a computer and an audio transcriber or a computer and a financial calculator) to complete daily tasks.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-----------------------------------|--|
| 1. Operate equipment | 1.1 The range of equipment's functions is known 1.2 A range of advanced functions of office equipment is used 1.3 Advanced functions are operated correctly |
| 2. Complete tasks | 2.1 Task is completed coordinating the advanced functions of a range of office equipment within designated timelines |
| 3. Ensure equipment is maintained | 3.1 Maintenance program for equipment is scheduled to ensure minimum downtime is experienced 3.2 Signs of problems are identified and/or anticipated, and options for solutions are clarified with colleagues and/or supervisor |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 1 |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | - |
| Using technology | - |

RANGE STATEMENT**Equipment used**

may include computer; audio transcribing machine; financial calculator; overhead projector; photocopier; facsimile machine; scanner; telephone system; shredder; laminator; binder; franking machine.

| | |
|---|---|
| Advanced functions | may include performing calculations in tables and spreadsheets; performing a mail merge; image overlapping/separation on a photocopier; sending email with attachments; setting up conference calls; using group dialling on a facsimile machine; creating links between documents and software applications. |
| Operating functions correctly | may include within the capabilities of the equipment; within occupational health and safety requirements; referring to instruction or training manuals; in the correct order. |
| Coordinating advanced functions | may include using resources efficiently; planning; organising a work schedule; streamlining parts of the task; consulting manuals and instructions; following workplace policies and procedures. |
| Within designated timelines | may include deadline agreed with supervisor; deadline agreed with internal/external client; in coordination with colleagues. |
| Maintenance program for equipment | may include checking stock levels; replacing components (e.g. paper, toner, staple cartridge); clearing paper jams; cleaning equipment; programming/setting up equipment (e.g. fax numbers for group dialling); arranging for technician to clean, check and repair equipment. |
| Minimum downtime | may include prompt problem resolution; time taken to service equipment. |
| Identifying and/or anticipating problems | may include routine checking of equipment; preparation of a maintenance program; encouraging feedback from work colleagues; keeping a log book of detected faults; checking that repairs have been carried out. |
| Options for solutions | may include fixing the fault; informing supervisor; proposing possible solutions to supervisor; contacting appropriate service person. |

EVIDENCE GUIDE

Critical aspects

- The range of functions of office equipment are identified and understood.
- Advanced functions of a range of office equipment are carried out efficiently according to the manufacturer's instructions.
- Tasks are completed using advanced functions of a range of office equipment.
- Tasks are completed within designated timelines.
- Resources are used efficiently.
- Enterprise policies and procedures for maintaining office equipment are understood and common maintenance tasks are undertaken according to manufacturer's instructions.
- Maintenance program is prepared and followed so that the likelihood of breakdown is minimised.
- Equipment faults or anticipated faults are acted upon or reported to appropriate person according to enterprise policies and procedures.
- Any difficulties are reported to designated person as appropriate.

Context of assessment

Evidence of competency can be met in different situations, including:

- on-the-job assessment
- off-the-job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a practice agency or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Scope of application

This unit is relevant across all areas of real estate agency equipment.

Resources required for assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- a range of office equipment
- workplace manuals and reference materials such as office equipment user manuals, enterprise policy and procedural manuals

Consistency in performance

This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Underpinning knowledge

- Range of advanced functions of office equipment
- Enterprise policies and procedures
- Identification of equipment faults
- Routine maintenance of office equipment
- Servicing options and procedures
- Needs of internal/external clients

Underpinning skills

- Literacy: follows technical manuals; performs a sequence of routine tasks given specific directions; interprets information from an appliance manual
- Problem-solving: chooses appropriate software; identifies technical problem and chooses efficient solution; identifies best course of action if the timelines are not being met
- Communication: listens to short, explicit instructions regarding use of equipment in the workplace; performs a series of routine tasks given clear directions; explains routine procedures to others; expresses an opinion, e.g. suggests improvements to workplace equipment
- Numeracy: interprets graphs and diagrams in a technical manual: estimates time to complete each task and uses a calendar/diary to manage workloads and prioritise tasks
- Organisational and team: consults with group members on operating procedures

BSATEC302B**Design and develop documents, reports and worksheets****Unit Descriptor**

This unit covers identifying ways in which existing document production processes can be made more efficient while maintaining high standards in appearance and presentation. Competency is achieved in this unit when word processing and one other software application have been achieved.

This unit can be assessed alone or in combination with other units making up a job role.

This is a customised version of a competency unit endorsed in the Administration Training Package and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Identify document requirements | 1.1 Enterprise requirements for information entry, storage, output and quality of presentation are identified from the nominated person 1.2 Enhancements to document production processes are identified |
| 2. Design and enhance document formats | 2.1 Document design is appropriate for the efficient entry of information 2.2 Document design maximises the appearance and presentation of the document 2.3 The range of functions incorporated into the document design reflects the nominated requirements of the enterprise |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | - |
| Collecting analysing and organising information | 1 |
| Planning and organising activities | 1 |
| Working with others and in teams | - |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 1 |

RANGE STATEMENT

| | |
|---|--|
| Enterprise requirements | may include guidelines for document design and production ; document style manual; templates; information entry speed requirements; colour printing; binding; logical organisation of information; easy access to and retrieval of information; information presented appropriately; house style (margins, fonts). |
| Nominated person | may include direct supervisor ; office manager; publications manager; marketing manager. |
| Document production processes | may include choosing appropriate software application; structure of document; printing options (e.g. colour, colour copying, outsourcing); binding; format of document; following enterprise procedures and policies; following specific production directions. |
| Types of documents | may include letter, memo and fax; briefing paper; database; financial report; table; questionnaire; flyer; spreadsheet; chart. |
| Maximising the appearance and presentation of the document | may include inserting symbols; using coloured text; adding borders or shading; enhancing text; incorporating graphics and pictures; using tables and charts; adding headers and footers. |
| The range of functions incorporated into document design | may include formatting; text layout; importing graphics, charts, tables; using formulae; linking documents. |

EVIDENCE GUIDE

| | |
|-------------------------|---|
| Critical aspects | <ul style="list-style-type: none"> • Purpose of document and audience requirements are clarified and understood. • Enterprise policies and procedures regarding the entry, storage, output and quality of presentation are identified with the nominated person. • The appropriate software applications are selected. • Document production process meets document and enterprise requirements. • A range of formatting features which enhance the presentation and readability of the document are identified and used. • The document design allows information to be entered efficiently. • The range of functions incorporated into the document appropriately reflects the nominated requirements of the enterprise. |
|-------------------------|---|

| | |
|--|--|
| Context of assessment | <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on-the-job assessment • off-the-job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a practice agency or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times) <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports |
| Scope of application | This unit is relevant across all areas of real estate agency business. |
| Required workplace performance | The work will involve some initiative within broad parameters established by agency and property marketing strategies. |
| Resources required for assessment | <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • computer equipment including relevant software • workplace manuals and reference materials such as computer and software user manuals, enterprise policy and procedural manuals |
| Consistency in performance | This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved. |
| Recording assessment | If this unit is successfully assessed the recording of this assessment will include 'Design and develop documents, reports and worksheets (PRODUCTS & VERSIONS)!'. |
| Underpinning knowledge | <ul style="list-style-type: none"> • Range of functions of computer software • The impact of formatting on presentation and readability • Enterprise document production and design process |

Underpinning skills

- Literacy: follows and understands the agency's procedures; uses basic models to produce a range of correspondence; uses page layout to support text structure; completes a range of formatted texts
- Proofreading and editing: checks own work and rereads for accuracy against original
- Communication: participates in informal conversations regarding computer technicalities; questions to clarify information; consults peers and supervisors where necessary to seek enhancement to document design
- Numeracy: enters data and calculations
- Keyboarding and technology: completes a range of formatting skills
- Problem-solving: determines document design/production/enhancements

BSATEC303B**Unit Descriptor****Maintain computer files**

. This unit of competency covers moving computer files between directories and folders and carrying out back-up procedures.

This unit can be assessed alone or in combination with other units making up a job role.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|-------------------------------|---|
| 1. Carry out file maintenance | 1.1 Files are copied, deleted and renamed as required 1.2 Directories or folders are created as required 1.3 File registers are maintained according to enterprise guidelines 1.4 Security checks and procedures are inserted where necessary 1.5 Back-ups are carried out as required 1.6 Back-up files are stored in the designated manner and location 1.7 Record of back-ups is maintained 1.8 Virus protection measures are used according to enterprise guidelines |
|-------------------------------|---|

RANGE STATEMENT**Copying, deleting and renaming files may include:**

- copying/deleting to and from a range of locations:
 - hard disk
 - network server
 - floppy disc
 - Internet
 - CD-ROM
- renaming folders and files.

Creating directories or folders may include

logical and orderly structure of folders, efficient naming of directories or folders, insertion of file name and location in document and storing related files together in common folders.

Enterprise guidelines may include

back-up procedures, file maintenance, file storage, deleting/renaming procedures, updating file index and cross-referencing.

Security checks and procedures may include

storage of data/files; access controls e.g. passwords; read-only files; installing surge protectors; and write-protecting floppy disks.

Carrying out back-ups may include

identifying files for back-up, frequency at which back-up occurs, responsibility for regular back-up, and particular computers.

Storage of back-up files may include:

- external hard disk
- floppy disk
- tape
- CD-ROM
- on site/off site
- in fireproof rooms
- at locations away from the office site
- in rooms secured against unauthorised entry.

Back-up record may include

system to verify back-up completed as scheduled, and exception report.

Virus protection measures may include

anti-virus software, controlling disk usage, file sharing restrictions and email attachment restrictions.

EVIDENCE GUIDE**Critical aspects**

- File is copied either between folders or drives using both keyboard and mouse functions.
- Files are deleted according to enterprise policies and procedures as necessary.
- Files are renamed logically according to enterprise policies and procedures.
- File management application is used to create directories and folders as necessary.
- The integrity of the computer filing system is maintained.
- The filing system operates smoothly.
- Security procedures and checks are identified and followed.
- Back-up procedures are identified and back-up files are created according to enterprise policies and procedures.
- Back-up media is labelled and stored according to enterprise policies and procedures.
- Back-ups are recorded according to enterprise policies and procedures.
- Virus protection measures are understood and used according to enterprise policies and procedures.
- Any uncertainties are referred to an appropriate authority promptly.

Resources implications

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- computer equipment including relevant software
- workplace manuals and reference materials such as computer user manuals, enterprise policy and procedural manuals.

Competency in performance

This unit of competency will require evidence to be collected across a range of events, e.g. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Context of assessment

Evidence of competency can be met in different situations, including:

- on-the-job assessment
- off-the-job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a practice agency or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- recognition of prior learning and recognition of current competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence-gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third-party reports.

Underpinning knowledge

- Enterprise computer filing system.
- Appropriate storage media.
- Functions of file management applications.
- Virus protection measures.
- Enterprise back-up policies and procedures.
- OHS.

Underpinning skills

- Literacy: follows an enterprise's filing system; identifies obsolete files; interprets training notes, user manuals, keeping records; sequences writing with attention to file code according to organisation's requirements.
- Numeracy: indexes and sorts files; sorts and classifies information.
- Communication: listens to clear sequenced instructions of several steps to complete task; questions to clarify status or physical location of file.

BSXFMI404A**Unit Descriptor****Participate in, lead and facilitate work teams**

This unit of competency is for those with a role in leading, participating in and facilitating the empowerment of work teams/groups, motivating, mentoring, coaching and developing team members and achieving team cohesion.

The competency would typically apply to front line managers who are involved in organisations as coordinators, team leaders, supervisors, forepersons or project managers. They are not usually responsible for managing other managers, but on a daily basis they play a crucial role in coordinating and influencing employees.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Participate in team planning. | <ul style="list-style-type: none"> 1.1 The team establishes clearly defined goals, purpose, roles, responsibilities and accountabilities within the organisation's goals and objectives 1.2 The team performance plan contributes to the organisation's business plan, policies and practices 1.3 The team agrees to processes to monitor and adjust its performance within the organisation's continuous improvement policies 1.4 The team includes in its plans ways in which it can benefit from the diversity of its membership. |
| 2. Develop team commitment and cooperation. | <ul style="list-style-type: none"> 2.1 The team uses open communication processes to obtain and share information 2.2 The team encourages and exploits innovation and initiative 2.3 Support is provided to the team to develop mutual concern and camaraderie. |
| 3. Manage and develop team performance. | <ul style="list-style-type: none"> 3.1 The team is supported in making decisions within agreed roles and responsibilities 3.2 The results achieved by the team contribute positively to the organisation's business plans 3.3 Team and individual competencies are monitored regularly to confirm that the team is able to achieve goals 3.4 Mentoring and coaching supports team members to enhance personal and collective knowledge and skills 3.5 Delegates' performance is monitored to confirm that they have completed the relevant delegation(s)/assignment(s). |
| 4. Participate in and facilitate the work team. | <ul style="list-style-type: none"> 4.1 Team effectiveness is encouraged and enhanced through active participation in team activities and communication processes 4.2 Individuals and teams are actively encouraged to take individual and joint responsibility for actions 4.3 The team receives support to identify and resolve problems which impede performance. |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

At AQF 4, front line managers will normally be engaged in a workplace context in which they:

- are autonomous, working under general guidance on progress and outcomes
- may supervise others
- may guide or facilitate teams
- have responsibility for, and limited organisation of, work of others
- apply knowledge with depth in some areas
- apply a broad range of skills to a range of workplace contexts
- are involved in some complexity in the choice of actions
- use competencies within routines, methods and procedures
- use some discretion and judgement for self and others in planning and using resources, services and processes to achieve outcomes within time constraints.

Front line managers at AQF 4 will normally operate in a relatively diverse workplace environment in which they use the organisation's:

- goals, objectives, plans, systems and processes
- quality and continuous improvement processes and standards
- processes and standards
- business and performance standards
- defined resource parameters
- ethical standards.

They use legislation, codes and national standards relevant to the workplace. A range of learning opportunities maybe used, for example:

- mentoring
- action learning
- coaching
- shadowing
- exchange/rotation
- structured training programs.

Teams may be one or a mixture of :

- ongoing
- work based
- project based
- cross-functional.

- Teams may include :**
- full time employees
 - contractors
 - part time employees.

- Front line management roles in teams may include :**
- leader
 - facilitator
 - participant
 - mentor.

All operations are performed in accordance with standard procedures and work instructions.

EVIDENCE GUIDE

Essential knowledge and enterprise requirements:

This guideline is to assist the development of assessment instruments/tools to assess the competence of frontline management. At AQF 4, frontline managers must provide evidence of consistent achievement of this unit's workplace outcomes, by showing evidence that they:

- acquire and use information appropriate to work responsibility
- establish among teams a commitment to the organisation's goals, values and plans
- manage work effectively to achieve goals/results
- make decisions within responsibility and authority
- provide clear direction in devolving responsibility and authority
- provide constructive feedback to delegates
- work effectively with team members who have diverse work styles, aspirations, cultures and perspectives
- use effective consultative processes
- monitor and introduce ways to improve team performance
- encourage teams to openly propose, discuss and resolve issues
- treat people openly and fairly
- support team to share knowledge and skills
- deal with conflict before it adversely effects team performance
- promote available learning methods to support team
- use information management systems
- select and use available technology appropriate to the task
- use the key competencies to achieve results (see table).

Critical aspects:

Consistent performance should be demonstrated. In particular look to see that :

- leadership skills are applied to the completion of work team projects including the allocation and delegation of tasks, taking into account task requirements, development needs and organisational policy
- issues are mediated and resolved maximising positive outcomes
- techniques to encourage appropriate participation of team/group members are applied
- requirements of tasks and organising, planning, job completion and evaluation stages are identified
- relevant information is located and appropriately applied
- provision of customer/client service is effective and responsive
- work is completed effectively with others.

Language, literacy and numeracy requirements:

This unit requires the ability to read and interpret company policies, procedures and business documentation. Writing is required to the level of completing workplace reports and documents.

Numeracy is also required, eg, to analyse business data in the form of tables and charts and analyse budgetary information relevant to the workplace.

Assessment method and context:

Competence in this unit may be assessed:

- on the job allowing for the demonstration of the competency under all normal and a range of abnormal circumstances
- by use of a suitable simulation and/or a range of case studies/scenarios
- by a combination of these techniques.

In all cases it is expected that practical assessment will be combined with targeted questioning to assess the underpinning knowledge and theoretical assessment will be combined with appropriate practical/simulation or similar assessment.

Resource implications:

This section should be read in conjunction with the range of variables for this unit of competency. Resources required include suitable access to an operating plant or equipment that allows for appropriate and realistic simulation. A bank of case studies/scenarios and questions will also be required to the extent that they form part of the assessment method. Questioning may take place either in the workplace, or in an adjacent, quiet facility such as an office or lunchroom. Access should be provided to industry competency standards and assessment systems and particular workplace development opportunities. No other special resources are required.

PREREQUISITES

This competency has **no** prerequisites.

BSXFMI504A**Unit Descriptor****Participate, lead in and facilitate work teams**

Frontline Management has a key role in leading, participating in, facilitating and empowering work teams/groups within the context of the organisation. They play a prominent part in motivating, mentoring, coaching and developing team members, and in achieving team cohesion

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Participate in team planning | <ul style="list-style-type: none"> 1.1 The team establishes clearly defined purposes, roles, responsibilities and accountabilities within the organisations goals and objectives 1.2 The team performance plan contributes to the organisations business plan, policies and practices 1.3 The team agrees to processes to monitor and adjust its performance within the organisations continuous improvement policies 1.4 The team includes in its plans ways in which it can benefit from the diversity of its membership |
| 2. Develop team commitment and cooperation | <ul style="list-style-type: none"> 2.1 The team uses open communication processes to obtain and share information 2.2 The team encourages and exploits innovation and initiative 2.3 Support is provided to the team to develop mutual concern and camaraderie |
| 3. Manage and develop team performance | <ul style="list-style-type: none"> 3.1 The team is supported in making decisions within its agreed roles and responsibilities 3.2 The results achieved by the team contribute positively to the organisations business plans 3.3 Team and individual competencies are monitored regularly to confirm that the team is able to achieve its goals 3.4 Mentoring and coaching supports team members to enhance their knowledge and skills 3.5 Delegates performance is monitored to confirm that they have completed their delegation/assignment |
| 4. Participate in and facilitate the work team | <ul style="list-style-type: none"> 4.1 Team effectiveness is encouraged and enhanced through active participation in team activities and communication processes 4.2 Individuals and teams are actively encouraged to take individual and joint responsibility for their actions 4.3 The team receives support to identify and resolve problems which impede its performance |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 3 |
| Using technology | 2 |

RANGE STATEMENT

At AQF 5, frontline managers will normally be engaged in a workplace context in which they:

- Are autonomous, working under broad guidance
- May supervise others
- May guide teams
- May have responsibility for planning and managing the work of others
- Will be involved in self-directed application of knowledge
- Have substantial depth of knowledge in some areas and a range of skills for work tasks, roles and functions
- Operate in varied or highly specific contexts
- Use competencies independently for routine and non-routine purposes
- Use judgement for self and others in planning and using resources, services and processes to achieve outcomes within time constraints

Frontline managers at AQF 5 will normally operate in diverse and complex workplace environments in which they use the organisations:

- Goals, objectives, plans, systems and processes
- Quality and continuous improvement processes and standards
- Business and performance plans
- Resources, which may be subject to negotiation
- Ethical standards

They use legislation, codes and national standards relevant to the workplace. A range of learning opportunities may be used, for example:

- Mentoring
- Action learning
- Coaching
- Shadowing
- Exchange/rotation
- Structured training programs

Teams may be one or a mixture of:

- On-going
- Work-based
- Project-based
- Cross-functional

Teams may include:

Teams may include:

- Full time employees
- Contractors
- Part time employees

Frontline management roles in teams may include:

- Leader
- Facilitator
- Participant
- Coach
- Mentor

EVIDENCE GUIDE**At AQF 5, frontline managers must provide evidence of consistent achievement at this Unit's workplace outcomes, by showing that they:**

- manage work effectively to achieve goals and results
- research, acquire and use information appropriate to work responsibility
- establish among teams a commitment to the organisations goals, values and plans
- make decisions within responsibility and authority in a diverse and complex workplace
- provide clear direction in devolving responsibility and accountability
- provide constructive feedback to delegates
- monitor and introduce ways to improve team performance
- work effectively with team members who have diverse work styles, aspirations, cultures and perspectives
- promote networking between teams for mutual benefit
- use effective consultative processes
- encourage teams to openly propose, discuss and resolve issues
- deal with conflict before it adversely affects team performance
- recognise, reward and support team achievement
- support team to share knowledge and skills
- promote available learning methods to support team
- use information management systems
- select and use available technology appropriate to the task
- use the key competencies to achieve results

BSXFMI511A**Contribute to the development of a workplace learning environment****Unit Descriptor**

Frontline Management plays a prominent role in encouraging and supporting the development of a learning organisation. Promoting a learning environment in which work and learning are integrated is an important goal to be achieved

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|---|--|
| 1. Create learning opportunities | <ul style="list-style-type: none"> 1.1 Workplace environments which facilitate learning are developed and supported 1.2 Learning plans are developed as an integral part of individual/team performance plans 1.3 Learning plans reflect the diversity of needs and learning opportunities 1.4 Individual/team access to, and participation in, learning opportunities is facilitated 1.5 Negotiation with training and development specialists results in the planning and provision of learning which enhances individual, team, and organisational performance |
| 2. Facilitate and promote learning | <ul style="list-style-type: none"> 2.1 Workplace activities are used as opportunities for learning 2.2 Coaching and mentoring contributes effectively to the development of workplace knowledge, skills and attitudes 2.3 The benefits of learning are shared with others in the team/organisation 2.4 Workplace achievement is recognised by timely and appropriate recognition, feedback and rewards |
| 3. Monitor and improve learning effectiveness | <ul style="list-style-type: none"> 3.1 Performance of individuals/teams is monitored to determine the type and extent of additional work-based support 3.2 Feedback from individuals/teams is used to identify and introduce improvements in future learning arrangements 3.3 Adjustments negotiated with training and development specialists results in improvements to the efficiency and effectiveness of learning 3.4 Records and reports of competency are documented and maintained within the organisations systems and procedures |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 3 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 2 |
| Using technology | 3 |

RANGE STATEMENT

At AQF 5, frontline managers will normally be engaged in a workplace context in which they:

- are autonomous, working under broad guidance
- may supervise others
- may guide teams
- may have responsibility for planning and managing the work of others
- will be involved in self-directed application of knowledge
- have substantial depth of knowledge in some area and a range of skills for work tasks, roles and functions
- operate in varied or highly specific contexts
- use competencies independently for routine and non-routine purposes
- use judgement for self and others in planning and using resources, services and processes to achieve outcomes within time constraints

Frontline managers at AQF 5 will normally operate in diverse and complex workplace environments in which they use the organisations:

- goals, objectives, plans, systems and processes
- quality and continuous improvement processes and standards
- business and performance plans
- resources, which may be subject to negotiation
- ethical standards

They use legislation, codes and national standards relevant to the workplace. A range of learning opportunities may be used, for example:

- mentoring
- action learning
- coaching
- shadowing
- exchange/rotation
- structured training programs

EVIDENCE GUIDE

This guideline is to assist the development of assessment instruments/tools to assess the competence of frontline management. At AQF 5, frontline managers must provide evidence of consistent achievement at this Unit's workplace outcomes, by showing that they:

- promote a learning culture in a diverse and complex workplace
- manage work effectively to achieve goals and results
- explain basic principles of adult learning
- develop links between work and learning
- use coaching and mentoring to assist knowledge/skill formation
- monitor and introduce ways for people to develop knowledge and skills
- facilitate opportunities for learning
- encourage colleagues to share their knowledge and skills
- create opportunities for individuals/teams to learn from workplace performance
- negotiate with training and development specialists individual/team learning needs
- provide the opportunity for off-the-job learning to be applied in workplace
- promote available learning methods to support colleagues
- use information management systems
- select and uses available technology appropriate to the task
- use the key competencies to achieve results

PRMPM31A**Unit Descriptor****Process accounts receivable and payable**

This unit relates to the ongoing accounting activities associated with accounts receivable and payable.

This is a customised version of a competency unit in the Asset Maintenance Training Package (PRM98) and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|---|
| 1. Collect information and calculate invoice | 1.1 Supporting documentation required for invoicing is collected and processed 1.2 Fees and price adjustments are calculated where applicable 1.3 All calculations are made accurately 1.4 Correct account category is allocated to the debtor 1.5 Debtors ledger is maintained accurately 1.6 The control account in the general ledger is reconciled |
| 2. Render accounts receivable | 2.1 The statement/invoices are processed accurately and all necessary details of the transaction are included 2.2 The statement is forwarded within the required timeframe |
| 3. Provide accounts receivable support service | 3.1 Financial enquiries are responded to politely and accurately, and information allowable under company policy and procedures is disclosed 3.2 Necessary documentation for assisting customers with enquiries is easily accessed 3.3 Any anomalies identified by customers are investigated and corrected according to company policy and procedures |
| 4. Reconcile invoices for payment | 4.1 Goods received and other documentation is checked for appropriate signature 4.2 Invoice is reconciled to goods/services received and purchase order 4.3 Invoice is checked to ensure all details are correct 4.4 Payment of invoice is correctly authorised according to company policy and procedures 4.5 Any variances or errors are investigated and rectified or reported to the appropriate person |
| 5. Process documentation for payment | 5.1 Cheque vouchers are raised and checked against invoices 5.2 Cheques are processed accurately according to company procedures 5.3 Enquiries from creditors are responded to politely and accurate information is given in compliance with company policy and procedures |

PRMPM31A Process accounts receivable and payable

6. Maintain accounts payable records
- 6.1 Payment is correctly allocated to departmental/section/group accounts
 - 6.2 Adjustments involving creditors' accounts are transferred to the correct ledger accounts
 - 6.3 Creditors' ledger is maintained in an accurate and up-to-date manner
 - 6.4 The control account in the general ledger is reconciled with the total of balances in the creditors' ledger
 - 6.5 Any discrepancies or irregularities are investigated and/or reported to the appropriate persons
 - 6.6 Reports are prepared as required

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

- Company** includes all forms of real estate business enterprises.
- System** may be manual or computer-based.
- Supporting documentation for invoicing** may include order forms, work notes, list of hire fees, standard charges for services, and auction sale details.
- Timeframe** may be determined by agency policy and procedures and industry practice.
- Other outgoings** may include government and industry levies, statutory charges, and yard fees.
- Information on company procedures** may be found in manuals or other relevant internal documentation.

EVIDENCE GUIDE

Context of assessment

Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.

Evidence used to assess competency may include:

- review of the actual work performed under conditions that closely resemble normal industry operating conditions
- observation of the operating of an accounts payable and receivable system

Resources required for assessment include:

- access to industry assessors
- access to a computerised or manual environment

Underpinning knowledge

- Standard accounting procedures
- General and subsidiary ledgers
- Company accounting system
- Accounting computer programs used by organisation
- Double entry bookkeeping operation of computer and/or manual systems
- Legal requirements
- Credit control
- Sources of credit status information
- Liquidity management
- Trust accounting

Underpinning skills

- Customer relations
- Prioritising work in relation to accounts receivable and payable
- Time management
- Communication
- Bookkeeping

PRMPM32A**Unit Descriptor****Maintain a cash receipting system**

This unit deals with the day-to-day activities involving bankable amounts to general accounts and trust accounts.

This is a customised version of a competency unit in the Asset Maintenance Training Package (PRM98) and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|------------------------|--|
| 1. Process payments | <ul style="list-style-type: none"> 1.1 Float is maintained and required change issued 1.2 Cheques and credit card payments are examined to ensure correct details, and processed according to company procedures 1.3 Moneys are received and receipted accurately and correct change given 1.4 Moneys are balanced against receipts 1.5 Company security precautions are adhered to |
| 2. Record transactions | <ul style="list-style-type: none"> 2.1 Receipts are allocated to the correct account numbers in accordance with company policy, accounting standards and legislative requirements 2.2 Relevant documentation is completed and moneys are documented and lodged according to company procedures 2.3 Irregularities are promptly referred to the appropriate person 2.4 Transaction records are accurately maintained in line with company procedures and accepted accounting practice |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 2 |
| Using mathematical ideas and techniques | 2 |
| Solving problems | 1 |
| Using technology | 2 |

RANGE STATEMENT**Company**

includes all forms of real estate business enterprises.

System

may be manual or computer-based.

| | |
|---|--|
| Security precautions | may include timelocks, security personnel, codes, night safe deposits, and external security agencies. |
| Maintenance of transaction records | may include reconciliation of debtors ledger to general ledger. |
| Information on company procedures | may be found in manuals or other relevant internal documentation. |

EVIDENCE GUIDE

| | |
|---|---|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.</p> |
| Resources required for assessment include: | <ul style="list-style-type: none"> • access to industry assessors • access to a computerised or manual environment |
| Underpinning knowledge | <ul style="list-style-type: none"> • Financial policies and procedures • Required accountancy procedures • Company ledger system • Computer equipment and software programs • Banking procedures • Fees and charges • Financial reconciliation • Relevant legislation • Internal security procedures |
| Underpinning skills | <ul style="list-style-type: none"> • Keyboard • Cash handling • Financial processing • Bookkeeping |

PRMPM35A

Unit Descriptor

Maintain asset management records and control

Asset control applies to all company assets.

This is a customised version of a competency unit in the Asset Maintenance Training Package (PRM98) and the title and national code of that source unit have been retained. This customised unit is not available on the NTIS, which will only reflect the original version.

Unit Sector

No Sector Assigned

ELEMENT

PERFORMANCE CRITERIA

- | | |
|-------------------------------------|---|
| 1. Classify assets | 1.1 Assets are identified and classified according to company requirements |
| | 1.2 Classification of assets is consistent with company business plan |
| 2. Record assets | 2.1 The level of disclosure in financial statements is determined/reviewed |
| | 2.2 The benefits of recognising non-material assets in the company financial reports are balanced against costs arising from the exercise |
| | 2.3 Assets are recorded in accordance with Australian accounting standards and other relevant legislation |
| 3. Determine value of assets | 3.1 Valuation components and unit costs are determined |
| | 3.2 Condition of asset is assessed |
| | 3.3 Useful and residual life of asset is determined |
| | 3.4 Current value of asset is calculated based on valid and reliable information |
| 4. Maintain asset management system | 4.1 Asset management system provides information on assets owned and/or controlled by the company |
| | 4.2 Relevance of asset management system is maintained through consultation with relevant personnel, and continually updated |
| | 4.3 Asset management system provides information on assets by type, as well as by functional category |

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 2 |
| Collecting analysing and organising information | 2 |
| Planning and organising activities | 2 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 1 |
| Solving problems | 1 |
| Using technology | 2 |

RANGE STATEMENT

| | |
|--|---|
| Company | includes all forms of real estate business enterprises. |
| System | may be manual or computer-based. |
| Assets | may include equipment, land, buildings, furniture, vehicles, goodwill, and business and marketing contracts. |
| Information to assist management strategies | may include details of maintenance schedules, and residual life of assets. |
| Relevant legislation | may include federal, State and local government. |
| Standards and codes of practice | may include those relating to taxation, Australian accounting practices and codes, corporations law, and partnership law. |

EVIDENCE GUIDE

| | |
|-------------------------------|--|
| Context of assessment | <p>Assessment of evidence should establish the individual's ability to perform the job to the standard required in the workplace.</p> <p>Evidence used to assess competency may include review of the actual work performed under conditions that closely resemble normal industry operating conditions.</p> |
| Underpinning knowledge | <ul style="list-style-type: none">• Relevant accounting standards• Relevant accounting practice codes• Relevant asset accounting manuals• Company policy and procedures |
| Underpinning skills | <ul style="list-style-type: none">• Research• Analytical• Consultation• Planning |

PRAS15A**Plan and schedule routine maintenance, repairs and modifications****Unit Descriptor**

This unit covers the arrangement of repairs to maintain a property.

Unit Sector

No Sector Assigned

ELEMENT**PERFORMANCE CRITERIA**

- | | |
|--|--|
| 1. Respond to maintenance/repair request | 1.1 Request for maintenance/repair is recorded 1.2 Priority/urgency of repair is assessed 1.3 Maintenance/repair is arranged in accordance with office procedures, client arrangements and legal requirements 1.4 Satisfactory completion of job is checked and records completed |
|--|--|

KEY COMPETENCIES

| Key Competency | Performance Level |
|---|-------------------|
| Communicating ideas and information | 3 |
| Collecting analysing and organising information | 3 |
| Planning and organising activities | 3 |
| Working with others and in teams | 1 |
| Using mathematical ideas and techniques | 3 |
| Solving problems | 2 |
| Using technology | 2 |

RANGE STATEMENT

- | | |
|-------------------------------|--|
| Commercial environment | includes consideration of market expectations and type of property. |
| Legislation | includes consideration of ethics relating to property maintenance and legislation relating to business contracts. |
| Information available | includes information on maintenance contractors and standards of property maintenance. |
| Category of client | may include individuals, corporate enterprises, private enterprises, or government agencies and government business enterprises. |
| Agency procedures | may include procedures for monitoring property maintenance and reporting. |
| Geographical location | may be rural or urban, and include local and State regulations affecting the property. |

Property inspections may include inspections by appointment only.

EVIDENCE GUIDE

Context of assessment

Assessment against this unit of competency may involve any of the following techniques:

- continuous assessment in an institutional setting that simulates the conditions of performance describe in the elements, performance criteria and range statement that make up the unit
- continuous assessment in the workplace, taking into account the range statement affecting performance
- self-assessment on the same terms as those described above
- simulated assessment or critical incident assessment, provided the critical incident involves assessment against performance criteria and an evaluation of underpinning knowledge and skill required to achieve the required performance outcomes

Evidence of competency will include:

- clearly identifying job requirements
- organising for repairs to be carried out
- preparing realistic work schedules, which include consideration of contingencies
- preparing work orders

Evidence of competency is best obtained by observing activities in the field and in the office and reviewing the planning and scheduling of repairs and maintenance for security equipment/systems under conditions that closely resemble normal industry operating conditions.

Scope of application

The unit applies to maintenance of leased properties.

Required workplace performance

Work is undertaken with minimal supervision and may entail some discretion in allocation of tradespersons to job. Work is generally supported by organisational structures/procedures.

Underpinning knowledge

- Office procedures for planning and scheduling routine maintenance, repairs and modifications
- Property management contracts
- Relevant legislation

Underpinning skills

- Research into planning and scheduling routine maintenance, repairs and modifications
- Communication in relation to planning and scheduling routine maintenance, repairs and modifications
- Problem-solving in relation to planning and scheduling routine maintenance, repairs and modifications
- Record-keeping in relation to planning and scheduling routine maintenance, repairs and modifications



Australian Government

**Department of Education,
Science and Training**

PRD01 Property Development and Management Training Package

Volume 1 of 5



PRD01 Property Development and Management Training Package

Volume 1 of 5

